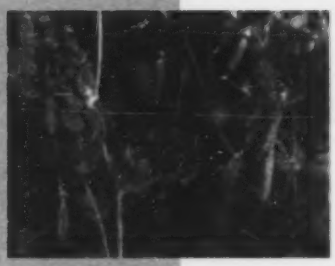
2002 - 2003 Manitoba Pulse, Forage & Specialty Crops Industry Profiles



Manitoba

Building for the Future

104-01934/

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N/A - not available
[R] - Revised
[P] - Preliminary

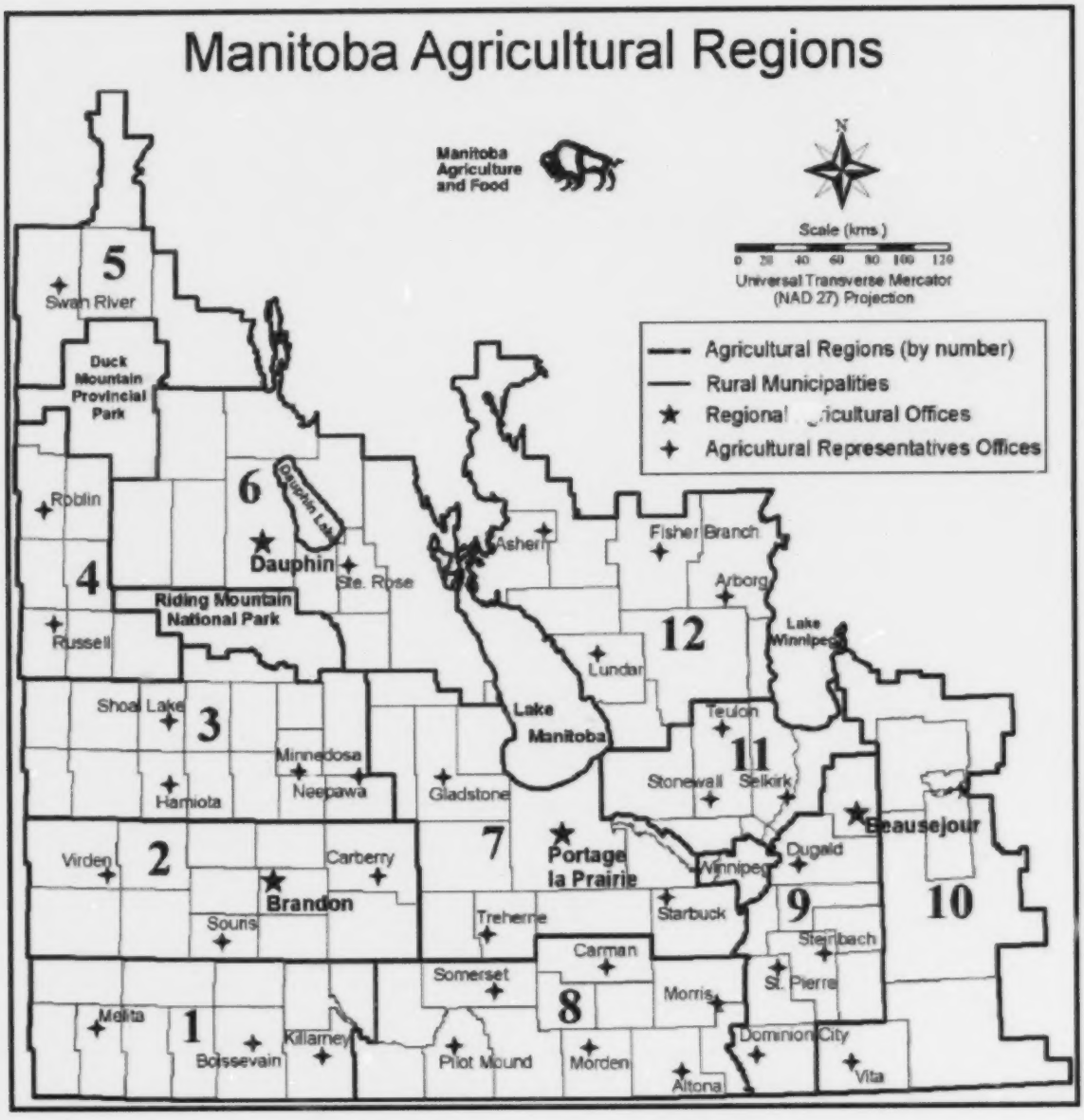
Data sources: *Agriculture and Agri-Food Canada*
Manitoba Agriculture, Food and Rural Initiatives
Statistics Canada

For further information, please contact:

Market Analysis & Statistics Section
Program and Policy Analysis Branch

Phone: (204) 945-4017 or (204) 945-2364
Fax: (204) 948-2844

December, 2003



Administrative Region Name	Agricultural Region Numbers
Southwest	1, 2, 3
Northwest	4, 5, 6
Central	7, 8
Eastern/Interlake	9, 10, 11, 12

BUCKWHEAT SECTOR

BUCKWHEAT SECTOR PROFILE

Production:

No buckwheat production was recorded in Manitoba prior to 1925 when 9,400 acres produced 97,000 bushels of buckwheat. The seeded area fell to just over 2,000 acres in the late 1940s, but rose to 61,800 acres in 1956. The crop declined in popularity in the next decade, but by 1970, the seeded area had risen to 80,000 acres. The area planted to buckwheat peaked at 135,000 acres in 1979 following the record production of 2.7 million bushels in 1978. Plagued by adverse weather, buckwheat yields declined in the early 1990s and only 15,000 acres were harvested in 1993. Yields improved in 1995 and 1996 to near-record levels of 21.0 and 23.3 bushels per acre respectively. In 2002 and 2003 yields averaged 16.3 and 16.7 bushels per acre, compared to the 10-year average of 18.3 bushels per acre.

Recent competition in the Japanese market from lower-priced Chinese-grown buckwheat as well as increased areas of other specialty crops in the province have resulted in a decrease in the area seeded to buckwheat in Manitoba. Harvested area, production and farm value of the crop in 2003 were 15,000 acres, 250,000 bushels and about $1.8 million respectively, compared to 20,000 acres, 325,000 bushels and $2.36 million in 2002. Manitoba continues to be the "Buckwheat Capital of Canada" even though only 54.6 percent of the Canadian crop was produced in the province in 2003 compared to 58.2 percent in 2002 and almost 90 percent in 1981. Other buckwheat-producing provinces are Ontario, Quebec and, sometimes, Saskatchewan.

Average buckwheat prices have ranged between $3.40 and $8.40 per bushel since 1973. The average price of $7.25 per bushel for the 2002 crop was up by 3.7 percent from the average price of $6.99 per bushel the previous year. Prices for the 2003 crop are expected to average close to $7 per bushel.

Marketing:

Manitoba producers deliver buckwheat to cleaning plants, where foreign material is removed and the seed cleaned and graded to export standard. The seed is shipped by truck or rail for export. Small amounts are sold through Winnipeg companies to local consumers. A few local companies buy and process small amounts of buckwheat for the bird food market.

Processing:

Buckwheat is bagged and sold by companies, such as Agricore United in Carman, Keystone Grain Ltd. in Winkler, S.S. Johnston Seeds Ltd. in Arborg, and Sabourin Seed Service Ltd. in St.Jean Baptiste. W.H. Escott Co. Ltd. in Winnipeg buys buckwheat in bulk quantities to make products, such as groats, grits, and flour. They repackage product under their own brand name for distribution or act as suppliers to other companies, such as Nelson David of Canada in Winnipeg.

Vita Health Co., Sunrise Food Stores and other health food and grocery stores market consumer-sized bags of buckwheat groats, flour and kasha.

Trade:

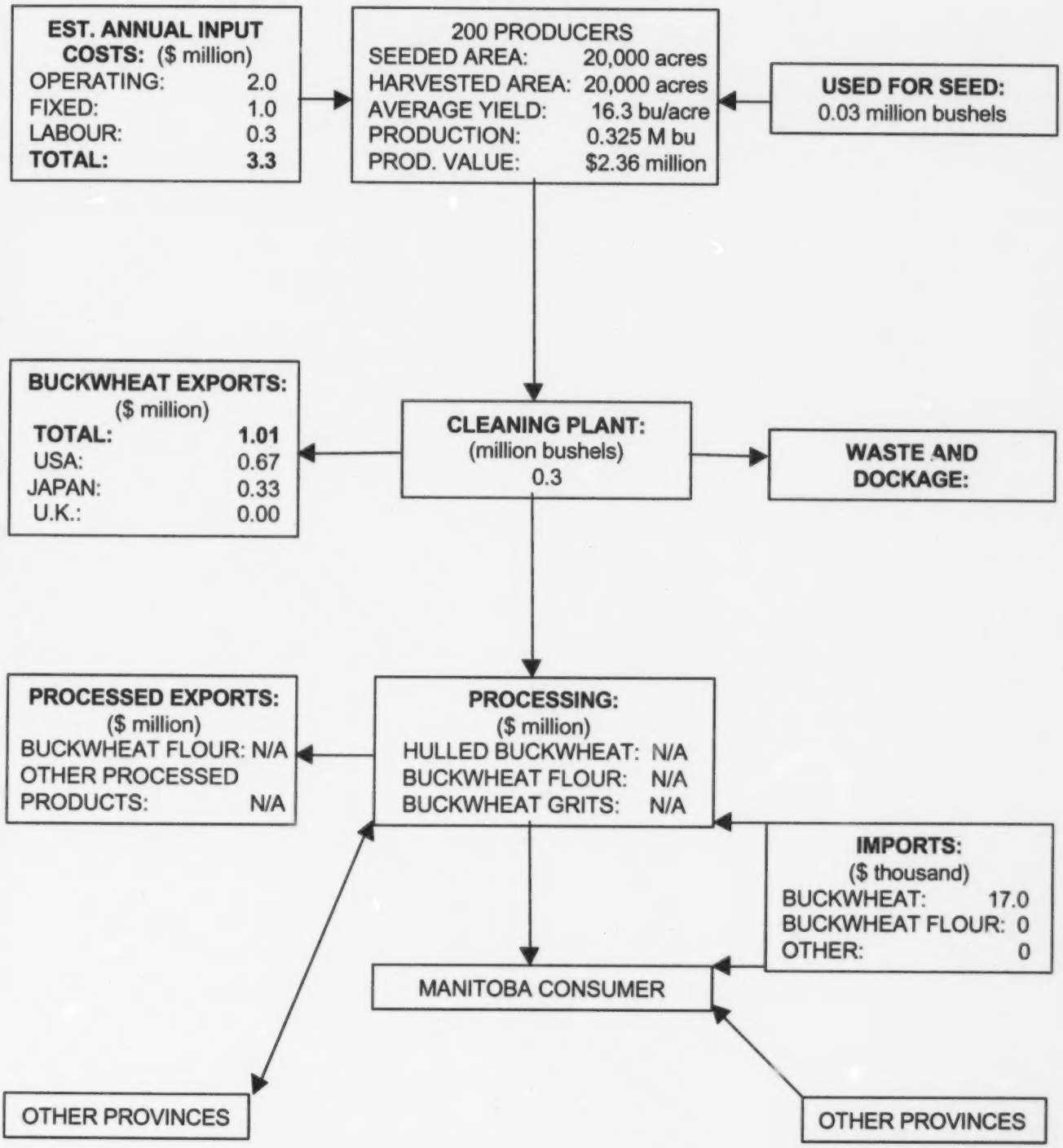
Most of Manitoba's buckwheat exports, valued at $1.7 million in 2001 and about $1.0 million in 2002, were shipped to Japan, the United States and United Kingdom. Although Japan bought half of Manitoba's buckwheat exports in 1995 for processing into soba noodles, the Japanese share of buckwheat exports declined to 33 percent in 2002.

Manitoba imported $24,500 of buckwheat in 2001 and about $17,000 in 2002, mostly from the United States. Much of this was grown under contract to Manitoba firms.

BUCKWHEAT SECTOR

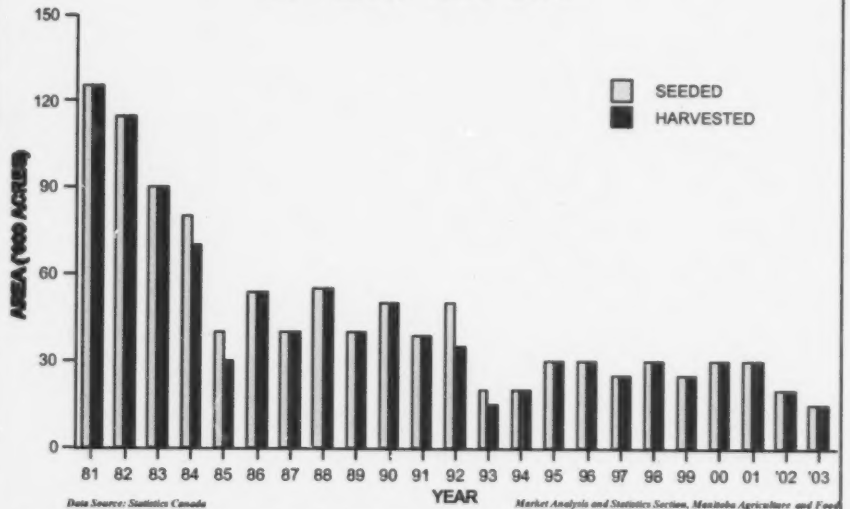
	1999	2000	2001 R	2002 R	2003 P	'03 as a % of '02
Estimated Number of Farms	350	400	333	200	150	75
CROP PRODUCTION:						
Seeded Area ('000 acres):	25	30	30	20	15	75
% of Canada	72.5	75.9	67.3	66.7	65.2	
Harvested Area ('000 acres):	25	30	30	20	15	75
Yield/acre (bushels)	16.0	15.0	19.1	16.3	16.7	
Production (thousand bu):	400	450	575	325	250	77
% of Canada	69.6	71.9	76.7	58.2	54.6	
Average Price ($/bu):	6.55	6.65	6.99	7.25		
VALUE OF PRODUCTION ($ million):	2.62	2.99	4.02	2.36		
ESTIMATED TOTAL EXPENSES ($/acre):	170.03	169.37	179.83	162.97	174.94	107
EXPORTS ($ million):	2.0	2.5	1.7	1.0		
Unprocessed	2.0	2.5	1.7	1.0		
Processed	0	0	0	0		
IMPORTS ($ thousand):	58.6	11.0	24.5	17.0		
Unprocessed	58.6	11.0	24.5	17.0		
Processed	0	0	0	0		

BUCKWHEAT INDUSTRY CHART, 2002



DATA SOURCE: Manitoba Agriculture, Food and Rural Initiatives, Statistics Canada, Agriculture & Agri-Food Canada

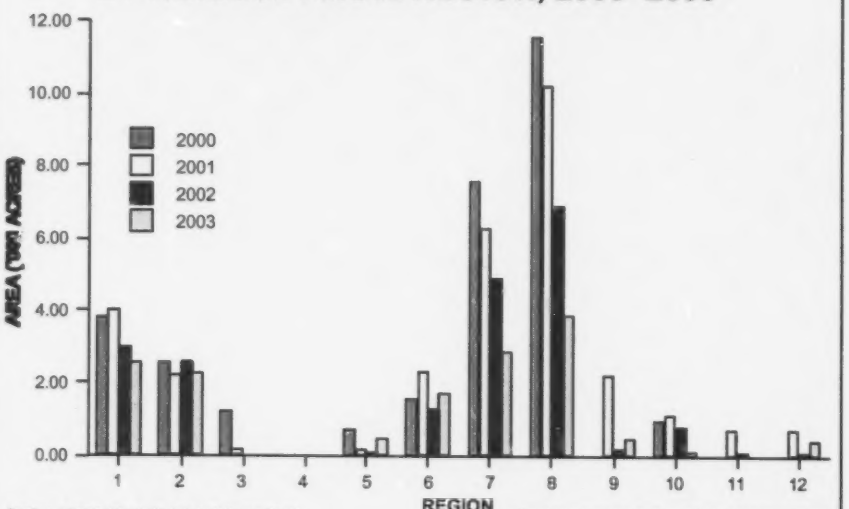
SEEDED & HARVESTED AREA OF BUCKWHEAT BY YEAR, 1981- 2003



Data Source: Statistics Canada

Market Analysis and Statistics Section, Manitoba Agriculture and Food

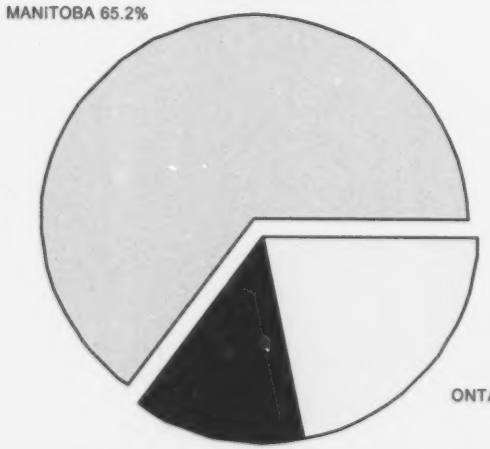
SEEDED AREA OF BUCKWHEAT BY AGRICULTURAL REGION, 2000- 2003



Data Source: Statistics Canada, Manitoba Agriculture and Food

Market Analysis and Statistics Section, Manitoba Agriculture and Food

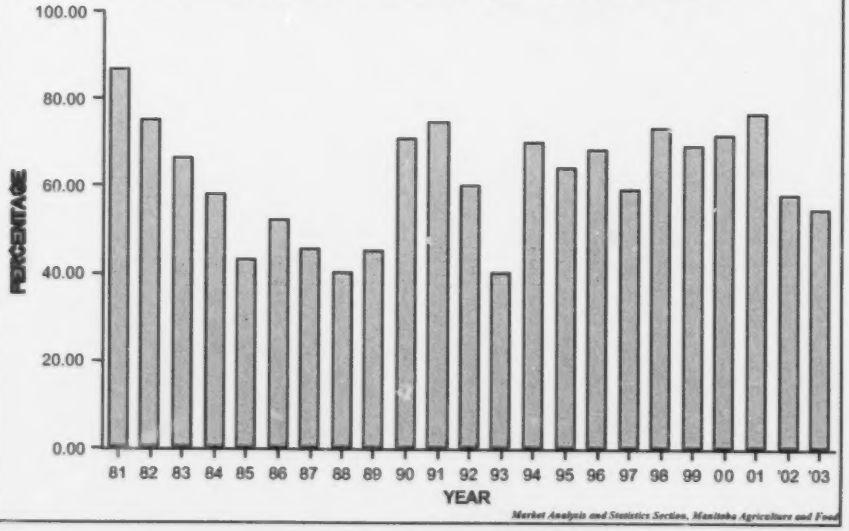
AREA OF BUCKWHEAT SEEDED BY PROVINCE, 2003



Source: Statistics Canada

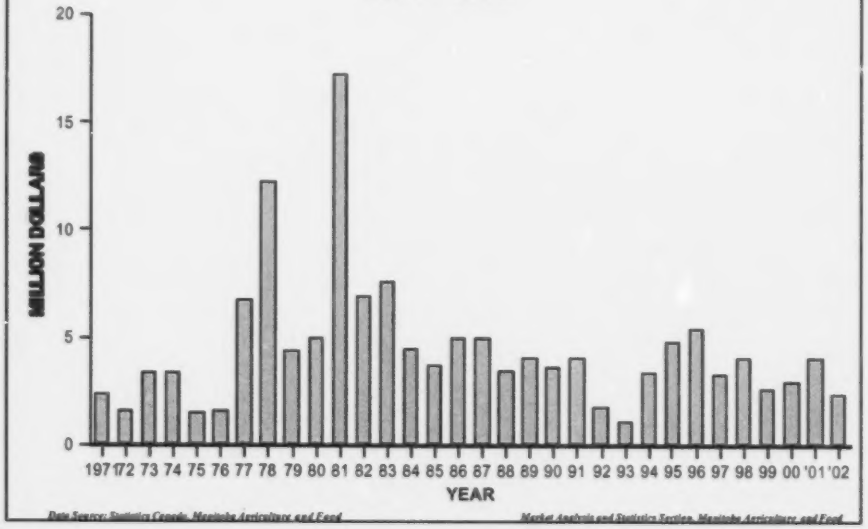
Market Analysis and Statistics Section, Manitoba Agriculture and Food

BUCKWHEAT PRODUCTION AS A PERCENTAGE OF CANADIAN PRODUCTION, 1981- 2003



Market Analysis and Statistics Section, Manitoba Agriculture and Food

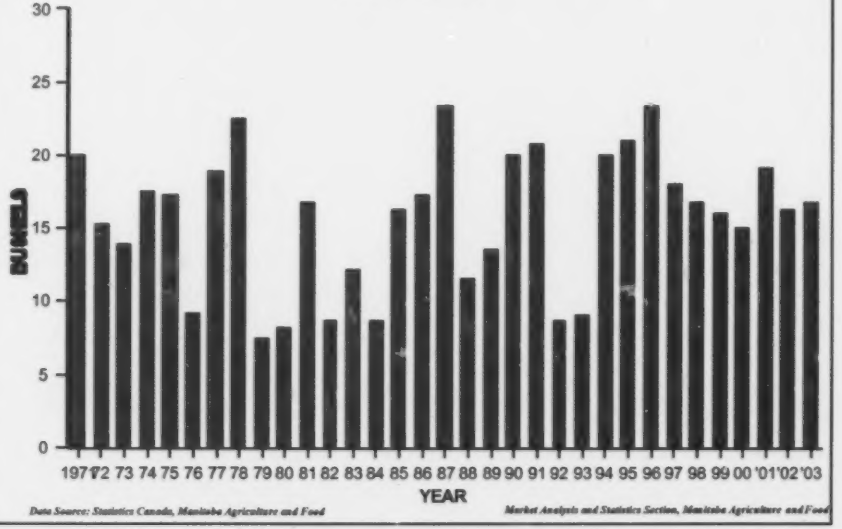
FARM VALUE OF BUCKWHEAT PRODUCTION
1971- 2002



Data Source: Statistics Canada, Manitoba Agriculture and Food

Market Analysis and Statistics Section, Manitoba Agriculture and Food

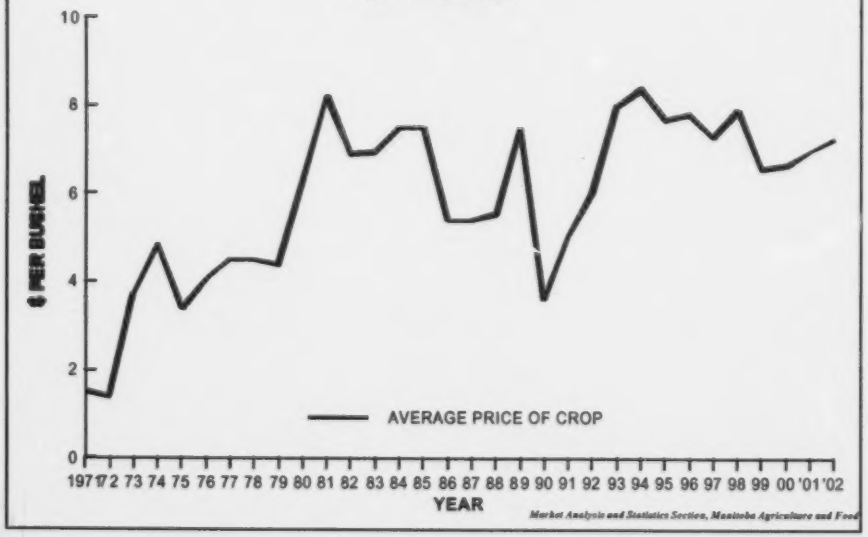
YIELD PER ACRE OF BUCKWHEAT
1971- 2003



Data Source: Statistics Canada, Manitoba Agriculture and Food

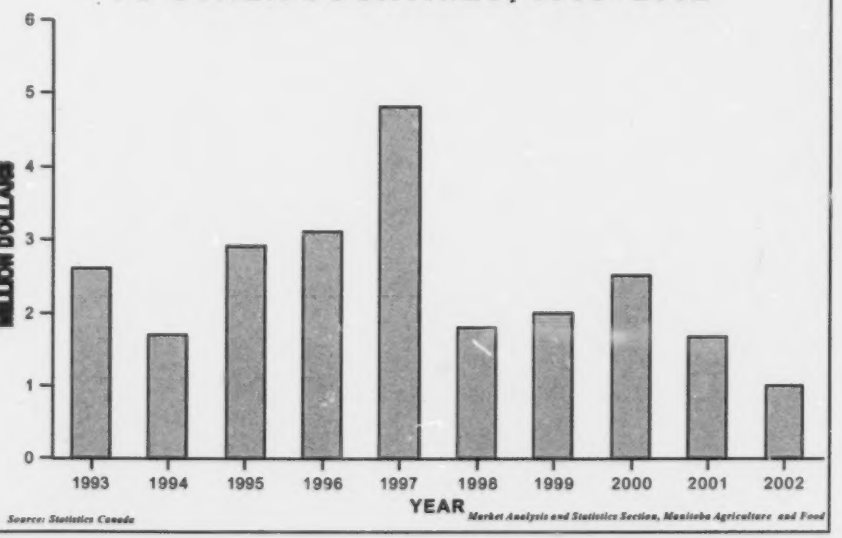
Market Analysis and Statistics Section, Manitoba Agriculture and Food

BUCKWHEAT PRICES
1971- 2002



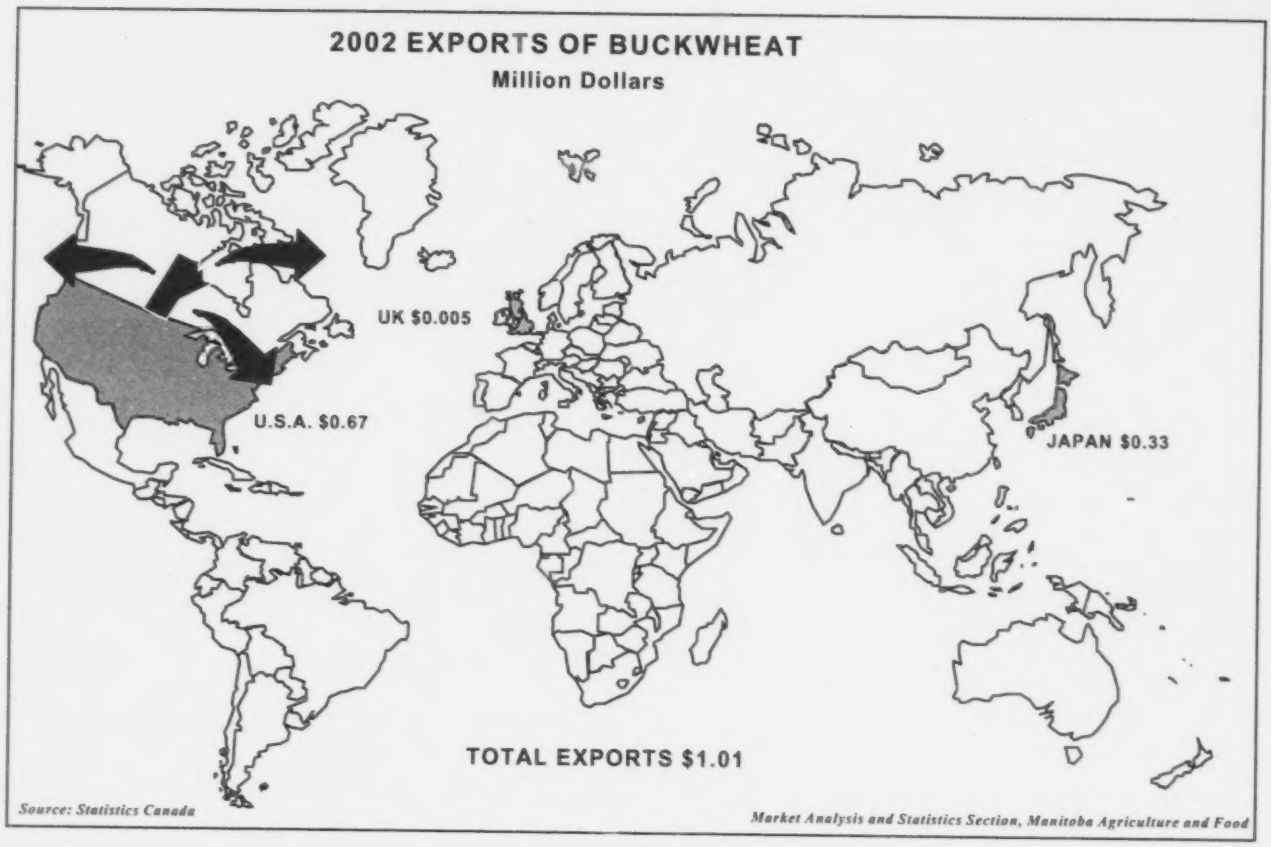
Market Analysis and Statistics Section, Manitoba Agriculture and Food

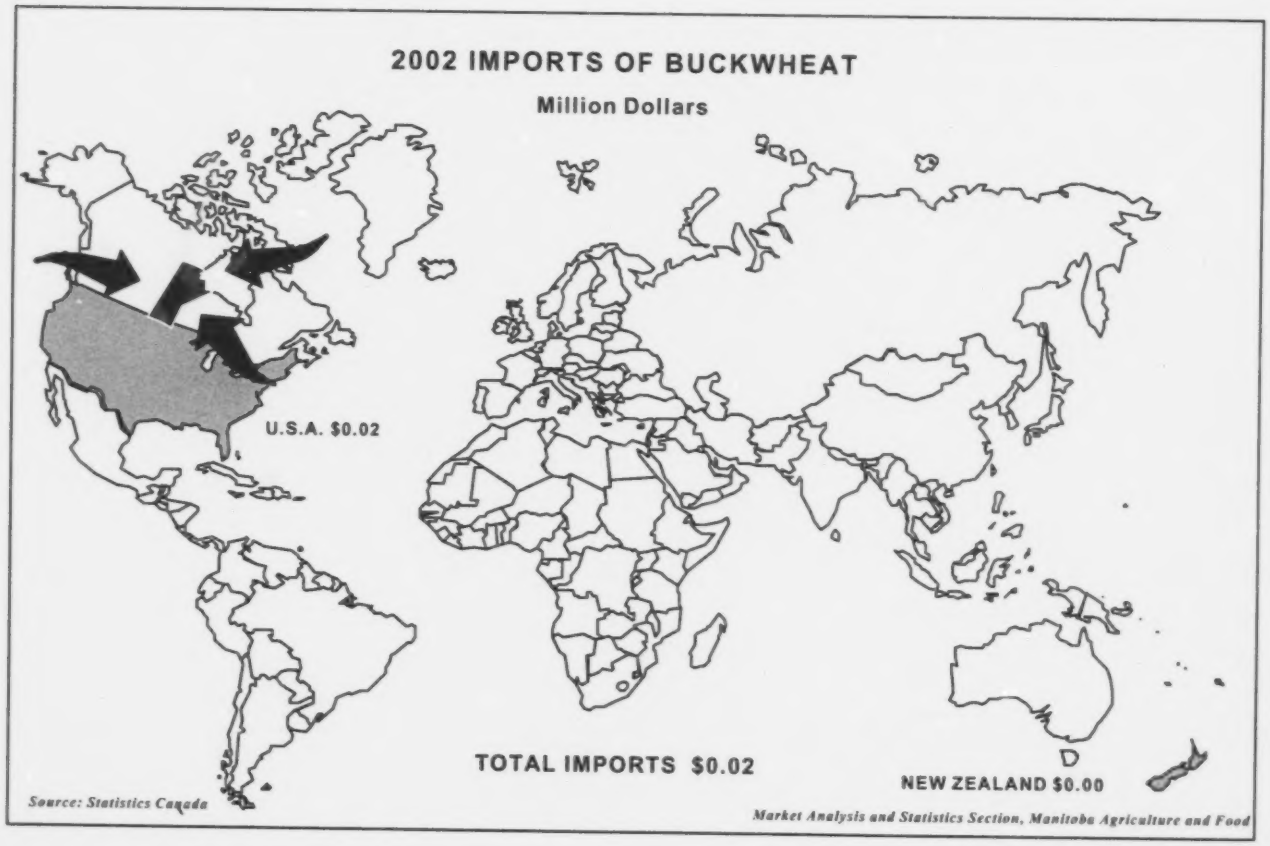
MANITOBA BUCKWHEAT EXPORTS
TO OTHER COUNTRIES, 1993- 2002



Source: Statistics Canada

Market Analysis and Statistics Section, Manitoba Agriculture and Food


2002 EXPORTS OF BUCKWHEAT
Million Dollars
UK $0.005
U.S.A. $0.67
JAPAN $0.33
TOTAL EXPORTS $1.01
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


2002 IMPORTS OF BUCKWHEAT
Million Dollars
U.S.A. $0.02
TOTAL IMPORTS $0.02
NEW ZEALAND $0.00
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

CANARY SEED SECTOR

CANARY SEED SECTOR PROFILE

Production:

Canary seed production was first recorded in Manitoba in 1963 when 1,500 acres were harvested and 800,000 pounds produced. The seeded area rose in the 1960s and 1970s, doubling to 15,000 acres from 1976 to 1977. The area planted to canary seed was up to 57,000 acres in 1986, but dropped significantly in 1987 because of low prices. Interest in canary seed production continued to wane until 1993 when only 12,000 acres were seeded, but higher prices in 1994 and 1995 encouraged producers to increase the canary seed area to 30,000 acres in those years. In 1996, the area seeded to canary seed more than doubled to a record 65,000 acres, but declined to 20,000 acres in 1997 and 15,000 acres in 1999 due to the price drop in 1996 and again in 1998. When prices improved, the seeded and harvested area increased over the next three years to a record 70,000 acres in 2002. There were 60,000 acres of canary seed seeded and harvested in 2003.

Average crop yields ranged from a low of 500 pounds per acre in both 1974 and 2001 to 1,333 pounds per acre in 1990. The average yield in 2003, at 1,167 pounds per acre, was up by 58 percent from 740 pounds per acre in 2002 and was 15 percent above the 10-year average of 1,014 pounds per acre.

The 2003 crop of 70.0 million pounds was the second largest on record, compared to 52.0 million pounds valued at $14.9 million in 2002 and a record 74.2 million pounds valued at $11.1 million in 1996. Manitoba, one of three provinces growing canary seed, produced 14.5 percent of the Canadian crop in 2003, up from 4.6 percent in 1999. The major canary seed-producing province is Saskatchewan with smaller amounts being grown in Alberta.

Average prices for the canary seed crop have ranged between $0.07 and $0.32 per pound since 1973. The average price for the 2001 crop was $0.30 per pound, while the average price for the 2002 crop was $0.29 per pound, in both cases about two and one-half times the 2000 price.

Marketing:

Most of the canary seed is delivered to a cleaning plant in Thunder Bay, where foreign material is removed and the seed cleaned to 98 percent purity (5 percent hulled) for export. The seed is loaded on ships for transportation to Western Europe. Some of the canary seed crop is cleaned by Manitoba plants and shipped directly to the United States and South America. Small amounts are sold to companies in Eastern Canada, from where packaged seed is sent back to Manitoba for the domestic birdseed market.

Processing:

Companies, such as Roy Legumex Inc. and Sabourin Seed Service Ltd. in St. Jean-Baptiste, Horizon Agro Inc. in Morris, Parent Seed Farm Ltd. in St. Joseph and S.S. Johnston Seeds Ltd. in Arborg, clean and bag canary seed. Some canary seed is mixed with other seed and sold as mixed birdseed in Manitoba.

Trade:

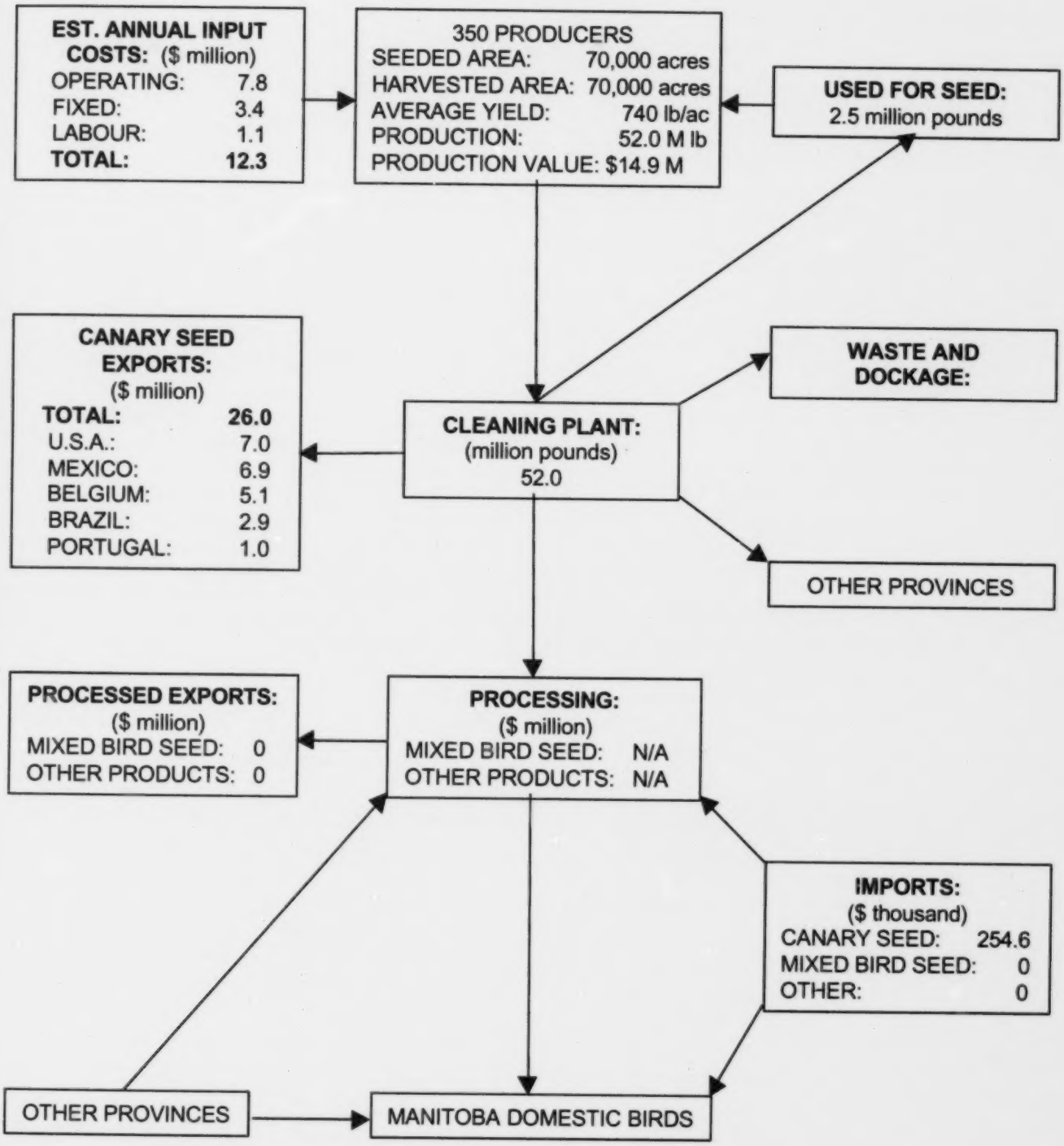
In 2002, Manitoba canary seed valued at $26.0 million was exported to 34 countries, such as the United States, Belgium, Mexico, Brazil and Portugal. About 30 percent of Manitoba's exports went to Western Europe in 2002, down from almost two-thirds in 1997.

Manitoba imported a small amount of canary seed from the United States valued at $254,600 in 2002, triple the amount in 2001.

CANARY SEED SECTOR

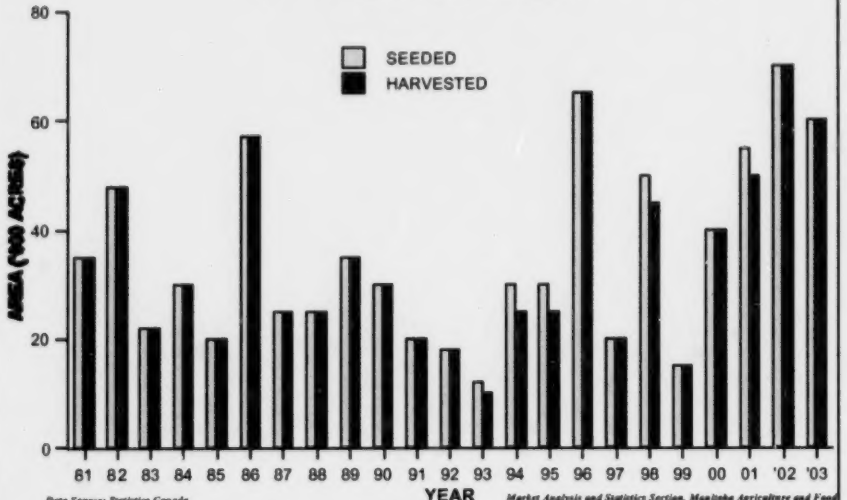
	1999	2000	2001 R	2002 R	2003 P	'03 as a % of '02
Estimated Number of Farms	200	400	275	350	300	86
CROP PRODUCTION:						
Seeded Area ('000 acres):	15.0	40.0	55.0	70.0	60.0	86
% of Canada	4.1	9.8	13.1	10.3	9.7	
Harvested Area ('000 acres):	15.0	40.0	50.0	70.0	60.0	86
Yield/acre (pounds)	1,120	950	500	740	1,167	158
Production (million lb):	16.8	38.0	25.0	52.0	70.0	135
% of Canada	4.6	10.1	10.0	14.4	14.5	
Average Price ($/lb):	0.110	0.122	0.300	0.290		
VALUE OF PRODUCTION ($ million):	1.85	4.64	7.57	14.87		
ESTIMATED TOTAL EXPENSES ($/acre):	168.74	168.74	187.13	175.70	192.55	110
CASH RECEIPTS ($ million):	3.3	2.8	4.8	11.0		
% of Canada	8.2	8.1	9.5	13.0		
EXPORTS ($ million):	14.8	14.4	19.3	26.0		
Cleaned Canary Seed	14.8	14.4	19.3	26.0		
Mixed bird seed	0	0	0	0		
IMPORTS ($ thousand):	47.4	274.1	84.7	254.6		
Cleaned Canary Seed	47.4	274.1	84.7	254.6		
Mixed bird seed	0	0	0	0		

CANARY SEED INDUSTRY CHART, 2002



DATA SOURCE: Manitoba Agriculture, Food and Rural Initiatives, Statistics Canada, Agriculture & Agri-Food Canada

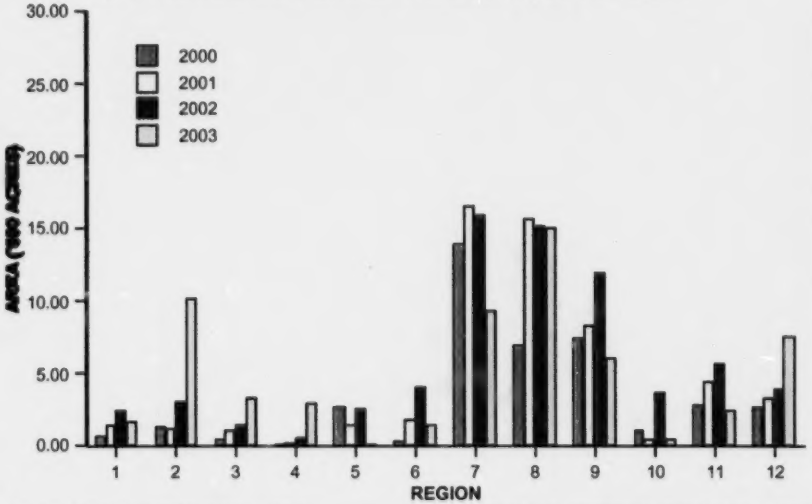
SEEDED & HARVESTED AREA OF CANARY SEED BY YEAR, 1981- 2003



Data Source: Statistics Canada

Market Analysis and Statistics Section, Manitoba Agriculture and Food

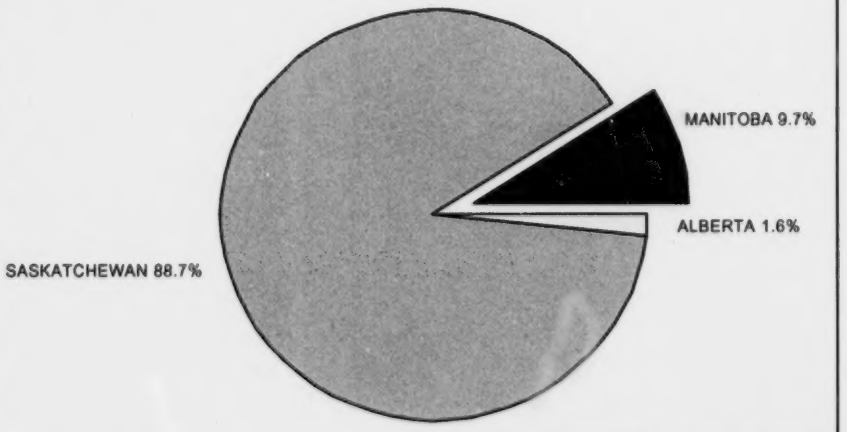
SEEDED AREA OF CANARY SEED BY AGRICULTURAL REGION, 2000- 2003



Data Source: Statistics Canada, Manitoba Agriculture and Food

Market Analysis and Statistics Section, Manitoba Agriculture and Food

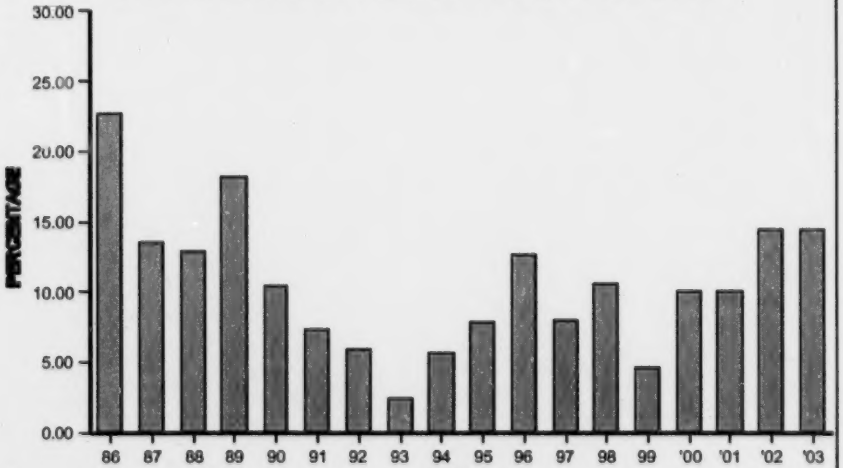
AREA OF CANARY SEED SEEDED BY PROVINCE, 2003



Source: Statistics Canada

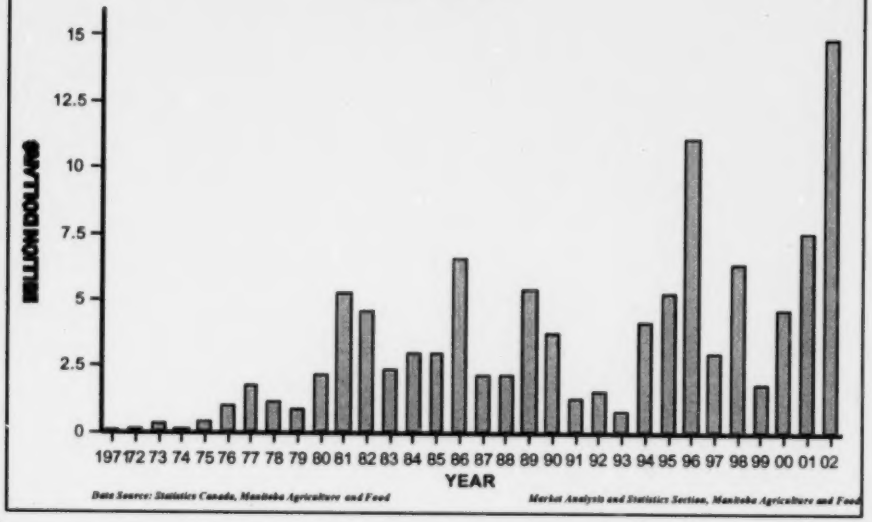
Market Analysis and Statistics Section, Manitoba Agriculture and Food

CANARY SEED PRODUCTION AS A PERCENTAGE OF CANADIAN PRODUCTION, 1986- 2003

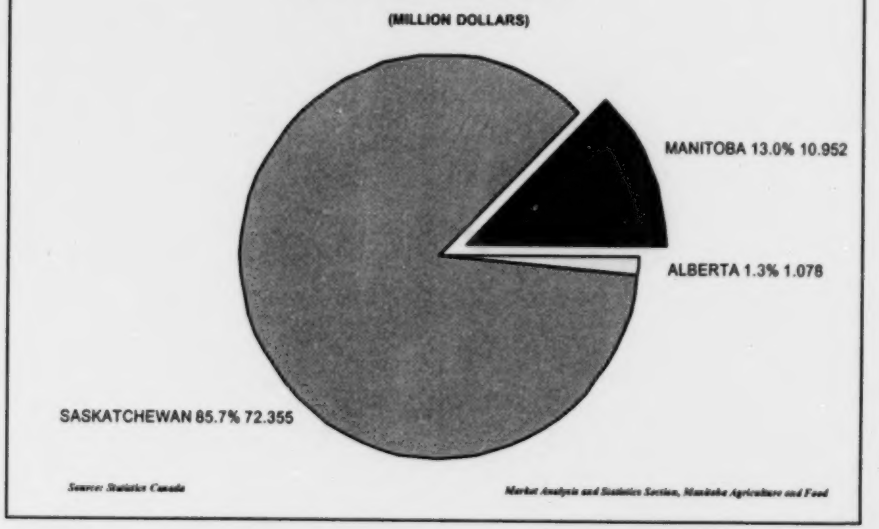


Market Analysis and Statistics Section, Manitoba Agriculture and Food

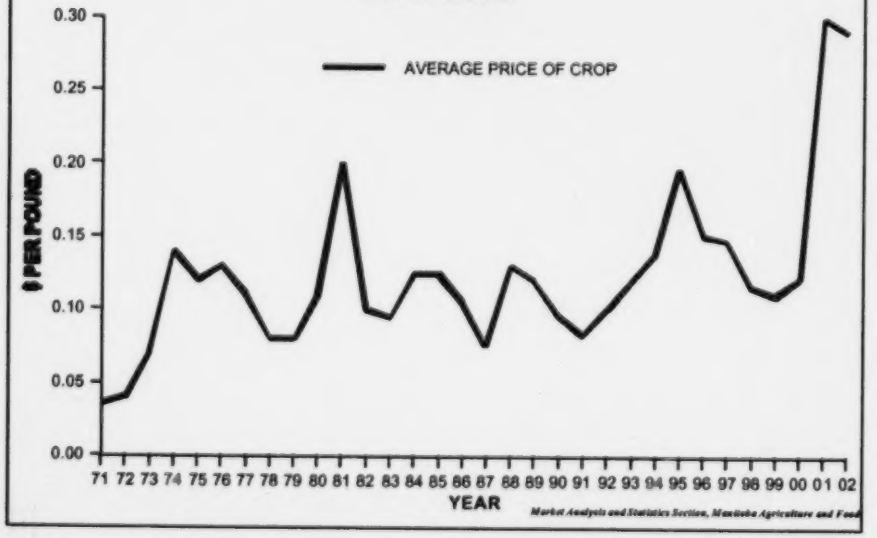
FARM VALUE OF CANARY SEED PRODUCTION 1971- 2002


BILLION DOLLARS
15
12.5
10
7.5
5
2.5
0
71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00 01 02
YEAR
Data Source: Statistics Canada, Manitoba Agriculture and Food
Market Analysis and Statistics Section, Manitoba Agriculture and Food

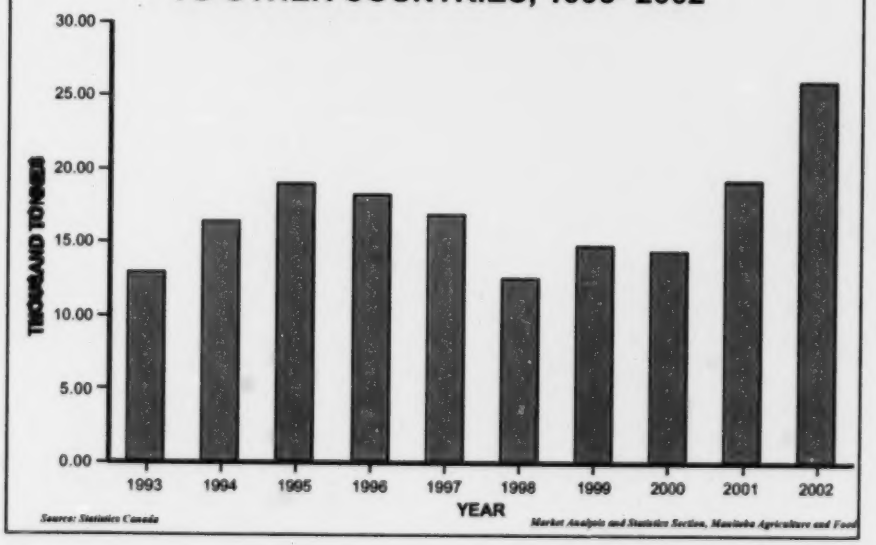
FARM CASH RECEIPTS FROM CANARY SEED BY PROVINCE, 2002

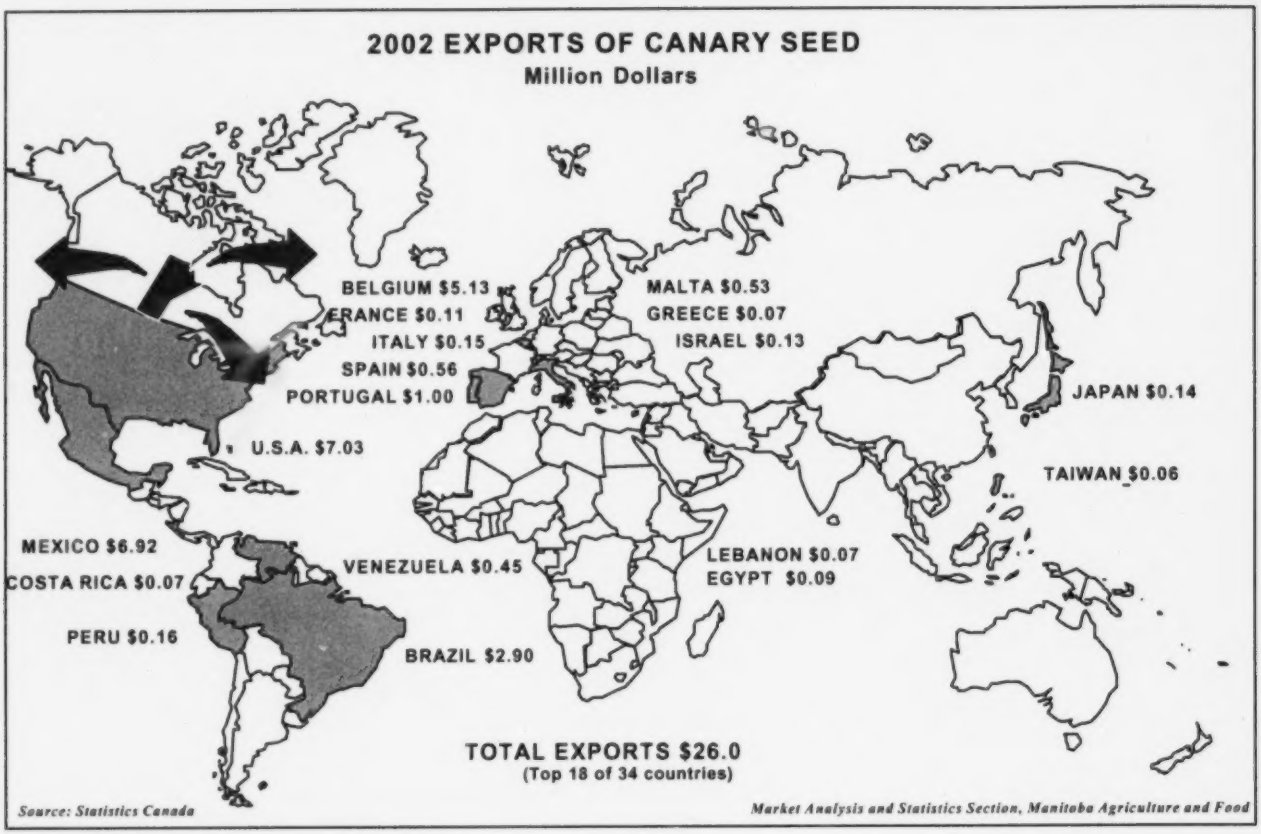


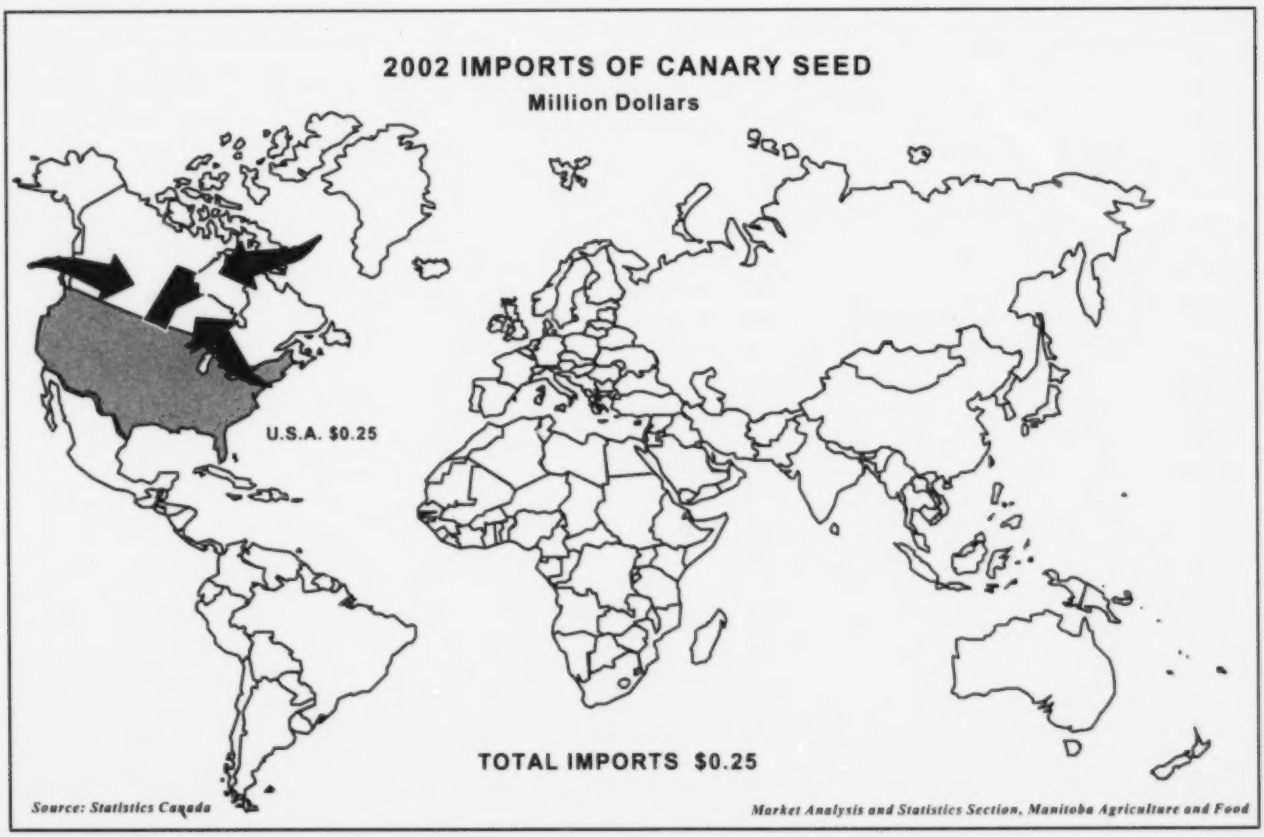
CANARY SEED PRICES 1971- 2002


AVERAGE PRICE OF CROP
$ PER POUND
0.30
0.25
0.20
0.15
0.10
0.05
0.00
71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00 01 02
YEAR
Market Analysis and Statistics Section, Manitoba Agriculture and Food

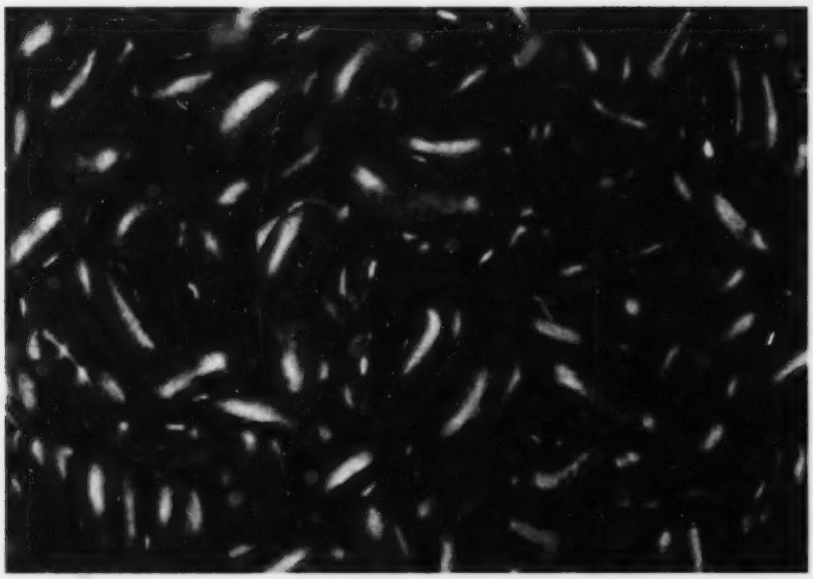
MANITOBA CANARY SEED EXPORTS TO OTHER COUNTRIES, 1993- 2002




2002 EXPORTS OF CANARY SEED
Million Dollars
BELGIUM $5.13
FRANCE $0.11
ITALY $0.15
SPAIN $0.56
PORTUGAL $1.00
U.S.A. $7.03
MEXICO $6.92
COSTA RICA $0.07
PERU $0.16
VENEZUELA $0.45
BRAZIL $2.90
MALTA $0.53
GREECE $0.07
ISRAEL $0.13
LEBANON $0.07
EGYPT $0.09
JAPAN $0.14
TAIWAN $0.06
TOTAL EXPORTS $26.0
(Top 18 of 34 countries)
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


2002 IMPORTS OF CANARY SEED
Million Dollars
U.S.A. $0.25
TOTAL IMPORTS $0.25
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

DRY BEAN SECTOR



DRY BEAN SECTOR PROFILE

Production:

Commercial production of dry beans began in the mid-1960s in Manitoba with 100 acres seeded and harvested in 1963. By 1981, the seeded area had increased to 19,300 acres with further significant increases occurring in the mid-1990s. There are agronomic benefits to dry bean production as well as net returns, which are at least comparable to wheat production. A record 310,000 acres of dry beans were harvested in 2002, but the area fell by 29.0 percent to 220,000 acres in 2003. Of this area, almost half was planted to white pea/navy beans (93,000 acres) and other beans (16,000 acres) with the remaining area seeded to pinto beans (74,000 acres), black or black turtle beans (17,000 acres), dark red and light red kidney beans (13,000 acres), red Mexican beans (7,000 acres) and cranberry (also called romano, speckled or sugar) beans (4,000 acres).

Average dry bean yields reached a record 1,670 pounds per acre in 1994. Yields averaged 1,660 pounds per acre in 2003, up by 0.9 percent from 1,645 pounds per acre in 2002 and the second highest ever. The 10-year average yield was 1,529 pounds per acre.

Production and crop value peaked in 2002 at 510.0 million pounds and $128.1 million respectively, but production decreased to 365.0 million pounds in 2003. Production and value were well above the 10-year averages of 234.6 million pounds and about $58 million.

Manitoba, the largest producer of dry beans in the country, produced 47.8 percent of the Canadian dry bean crop in 2003, down from 56.8 percent in 2002. About 29 percent of the national dry bean crop is grown in Ontario. Most of the remainder is produced in Alberta with smaller amounts in Quebec. Ontario focuses on white pea beans and coloured beans like Kidney and Cranberry beans, while Alberta grows mainly coloured beans.

Over the last twenty years, average dry bean prices have been in the $0.16 and $0.40 per pound range. The average price of $0.25 per pound for the 2002 crop was down from $0.30 per pound the previous year.

Marketing:

Annual farm cash receipts for the sector rose from $13.6 million in 1996 to $68.5 million in 2000, but declined to $42.8 million in 2001 and $51.8 million in 2002. Manitoba's contribution to Canadian dry bean receipts increased from 7.5 percent in 1993 to 55.7 percent in 2000. The percentage declined to 37.2 in 2002.

In 2002, Manitoba sold white pea/navy beans (58% of Canadian crop) and coloured beans (56% of Canadian crop) for human consumption.

Processing:

Companies such as Agricore United, Berdex Canada Ltd., Bison Commodities, Central Grain Co., Cloutier Agra Seeds, Duncan Seeds, Finora Canada Ltd., Global Grain Canada Ltd., H & W Seed Service, Hensall District Co-op., KBC Trading Co., Linear Grain, Parent Seed Farms, Prairieland Grain Co., Roy Legumex Inc., R.T. Stow Ltd., S.S. Johnson Seeds, Walhalla Bean Co. (Canada) and W.G. Thompson & Sons are dry bean buyers.

Trade:

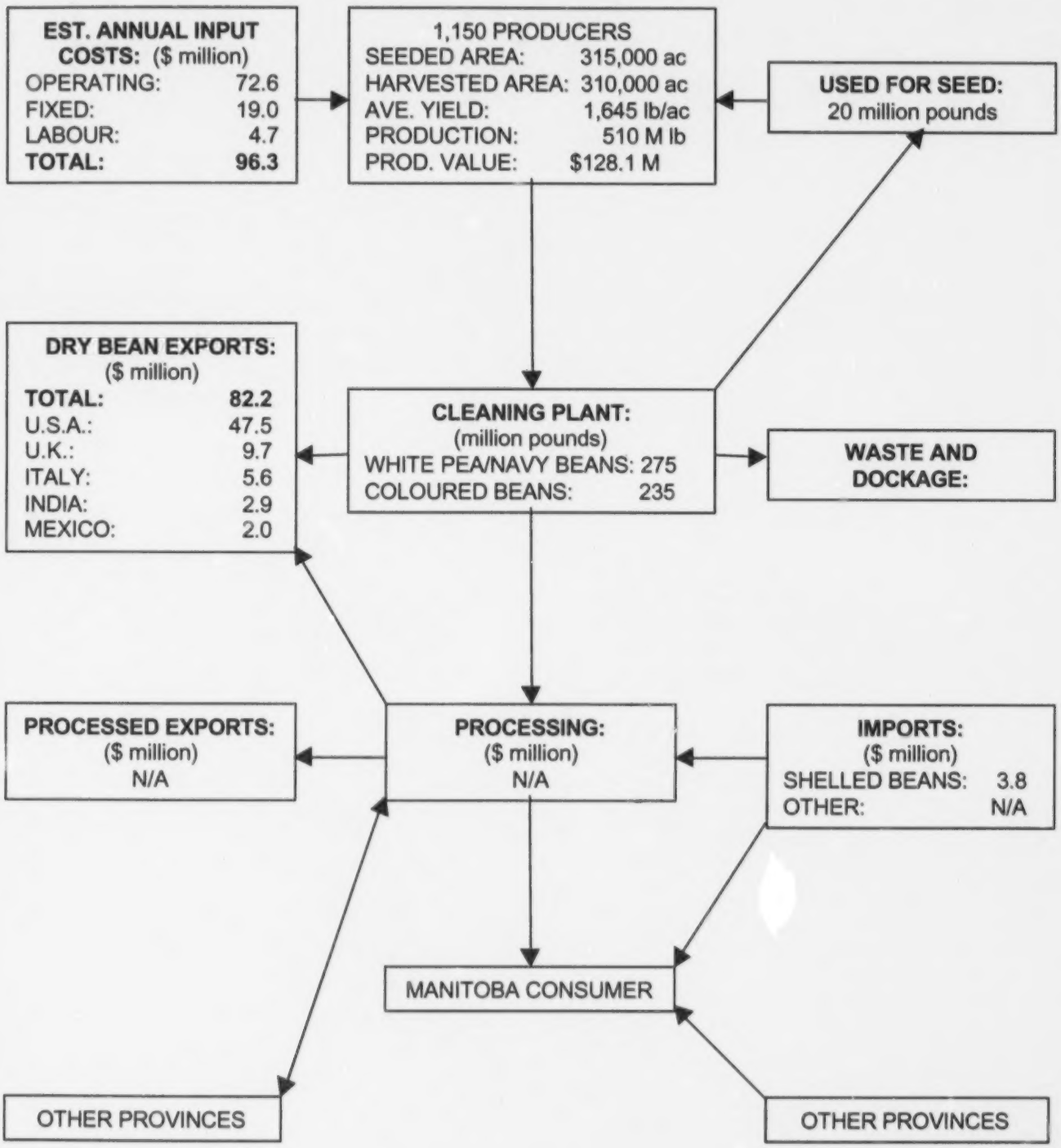
Manitoba's beans may be shipped to canneries in Eastern Canada for processing into products such as soups and pork and beans, but most beans are exported. Over $82 million of the dry beans sold out of province in 2002 were exported to 58 countries such as the United States, United Kingdom, Italy, Mexico, India, Venezuela and Spain.

Manitoba imported about $3.8 million of dry beans in 2002, mostly from the U.S., primarily for planting seed.

DRY BEANS AND DRY BEAN PRODUCTS SECTOR

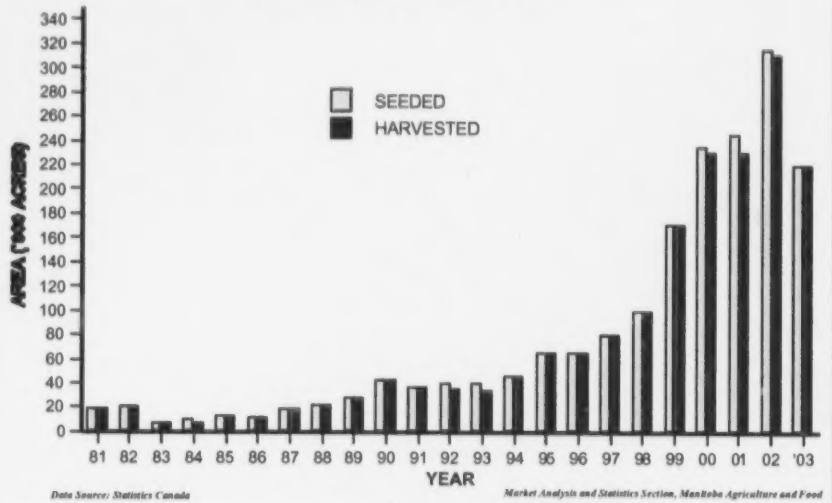
	1999	2000[R]	2001[R]	2002[R]	2003[P]	'03 as a % of '02
Estimated Number of Farms	850	1,000	886	1,150	900	78
CROP PRODUCTION:						
Seeded Area ('000 acres):						
All beans	170	235	245	315	220	70
% of Canada	45.9	57.7	55.3	56.6	54.9	
White Pea/Navy beans	100	125	125	175	110	63
Coloured beans	70	110	120	140	110	79
Harvested Area ('000 acres):	170	230	230	310	220	71
White Pea/Navy beans	100	120	120	170	110	65
Coloured beans	70	110	110	140	110	79
Yield/acre (pounds):	1,580	1,410	1,533	1,645	1,660	101
White Pea/Navy beans	1,600	1,380	1,440	1,620	1,680	104
Coloured beans	1,540	1.450	1,570	1,680	1,640	98
Production (million pounds):						
All beans	268	325	353	510	365	72
% of Canada	42.7	56.3	55.4	56.8	47.8	
White Pea/Navy beans	160	165	173	275	185	67
Coloured beans	108	160	180	235	180	77
Average Price ($/lb):	0.213	0.188	0.30	0.25		
VALUE OF PROD'N ($ million):	57.2	61.2	106.6	128.1		
EST. TOTAL EXPENSES ($/acre):	299.38	288.53	291.74	305.67	293.59	96
CASH RECEIPTS ($ million):	50.2	68.5	42.8	51.8		
% of Canada	40.6	55.7	42.2	37.2		
EXPORTS ($ million):	54.5	48.9	68.6	82.2		
Dry, shelled beans (incl. chickpeas)	54.5	48.9	68.6	82.2		
IMPORTS ($ million):	11.9	3.2	2.6	3.8		
Dry, shelled beans (incl. chickpeas)	11.9	3.2	2.6	3.8		

DRY BEAN INDUSTRY CHART, 2002



DATA SOURCE: Manitoba Agriculture, Food and Rural Initiatives, Statistics Canada, Agriculture & Agri-Food Canada

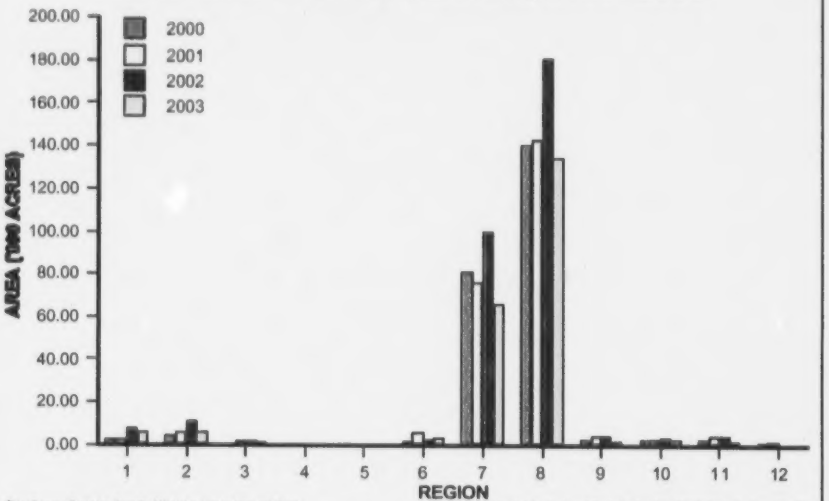
SEEDED & HARVESTED AREA OF DRY BEANS BY YEAR, 1981- 2003



Data Source: Statistics Canada

Market Analysis and Statistics Section, Manitoba Agriculture and Food

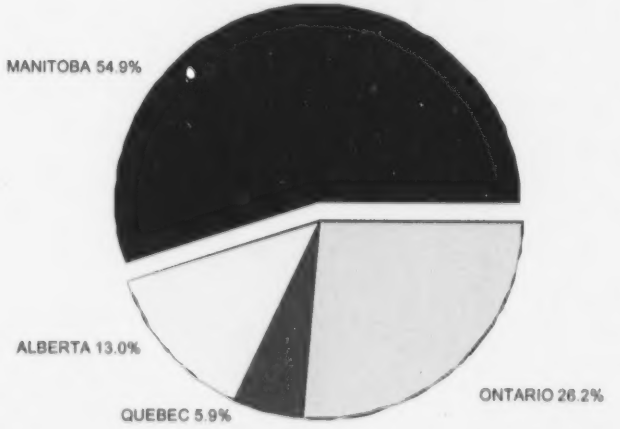
SEEDED AREA OF DRY BEANS BY AGRICULTURAL REGION, 2000- 2003



Data Source: Statistics Canada, Manitoba Agriculture and Food

Market Analysis and Statistics Section, Manitoba Agriculture and Food

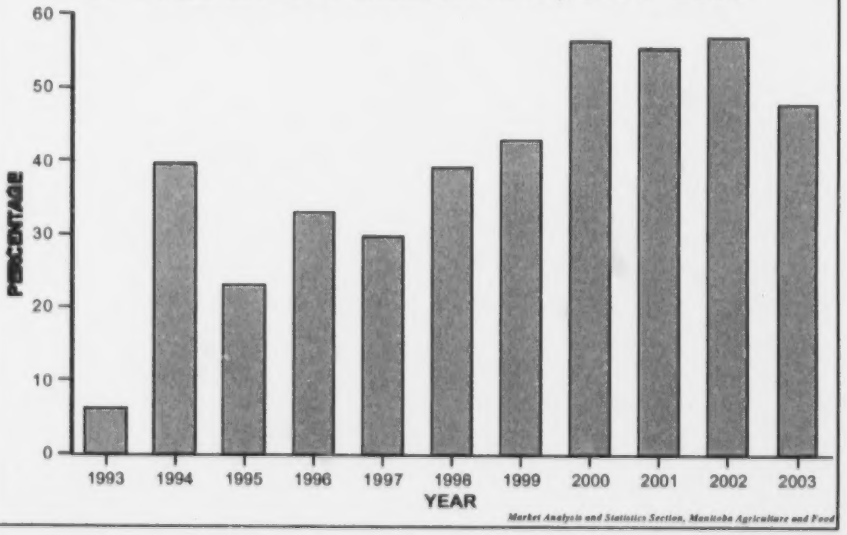
AREA OF DRY BEANS SEEDED BY PROVINCE, 2003



Source: Statistics Canada

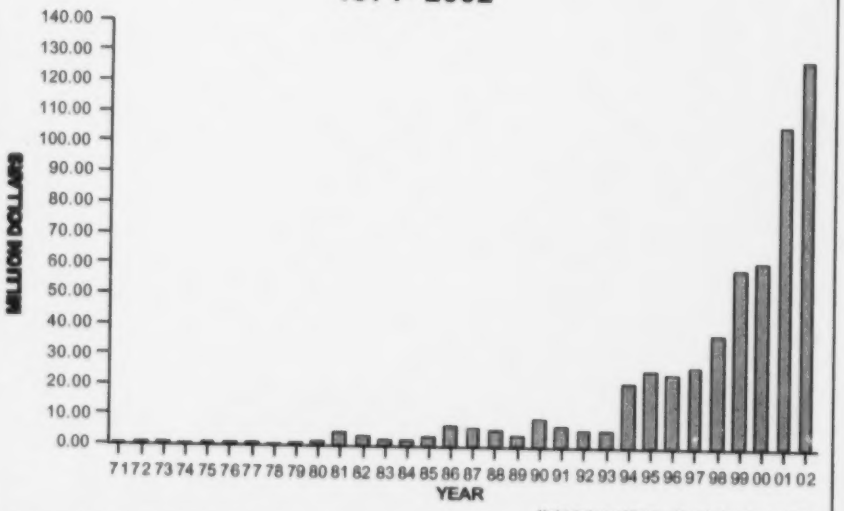
Market Analysis and Statistics Section, Manitoba Agriculture and Food

DRY BEAN PRODUCTION AS A PERCENTAGE OF CANADIAN PRODUCTION, 1993- 2003



Market Analysis and Statistics Section, Manitoba Agriculture and Food

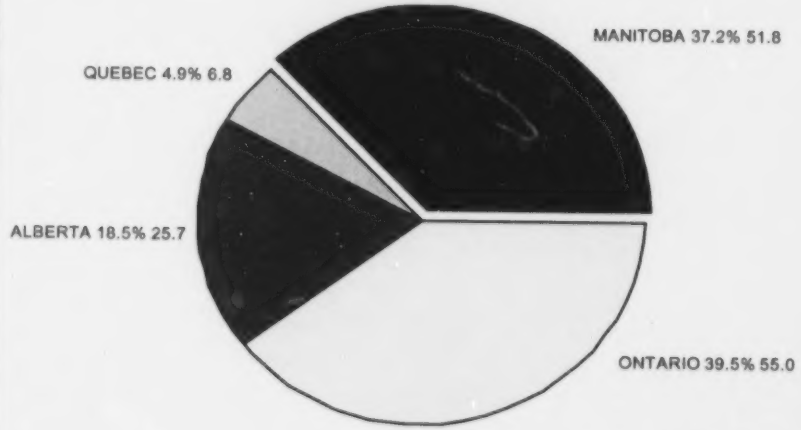
FARM VALUE OF DRY BEAN PRODUCTION
1971- 2002



Market Analysis and Statistics, Manitoba Agriculture and Food

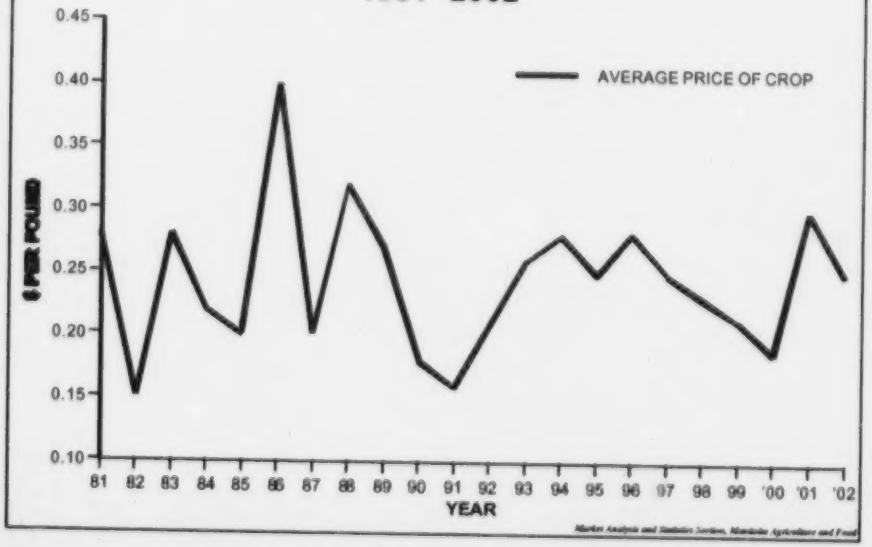
FARM CASH RECEIPTS FROM DRY BEANS
BY PROVINCE, 2002

(MILLION DOLLARS)



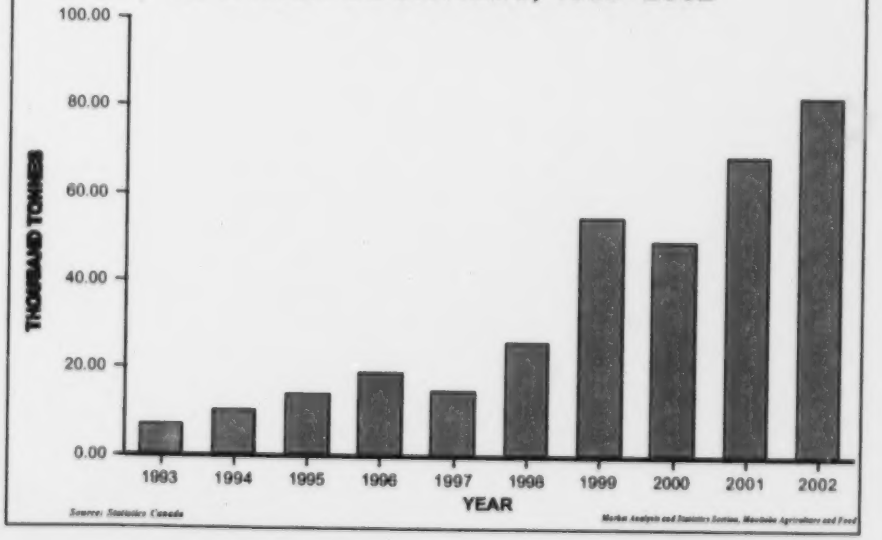
Market Analysis and Statistics Section, Manitoba Agriculture and Food

DRY BEAN PRICES
1981- 2002



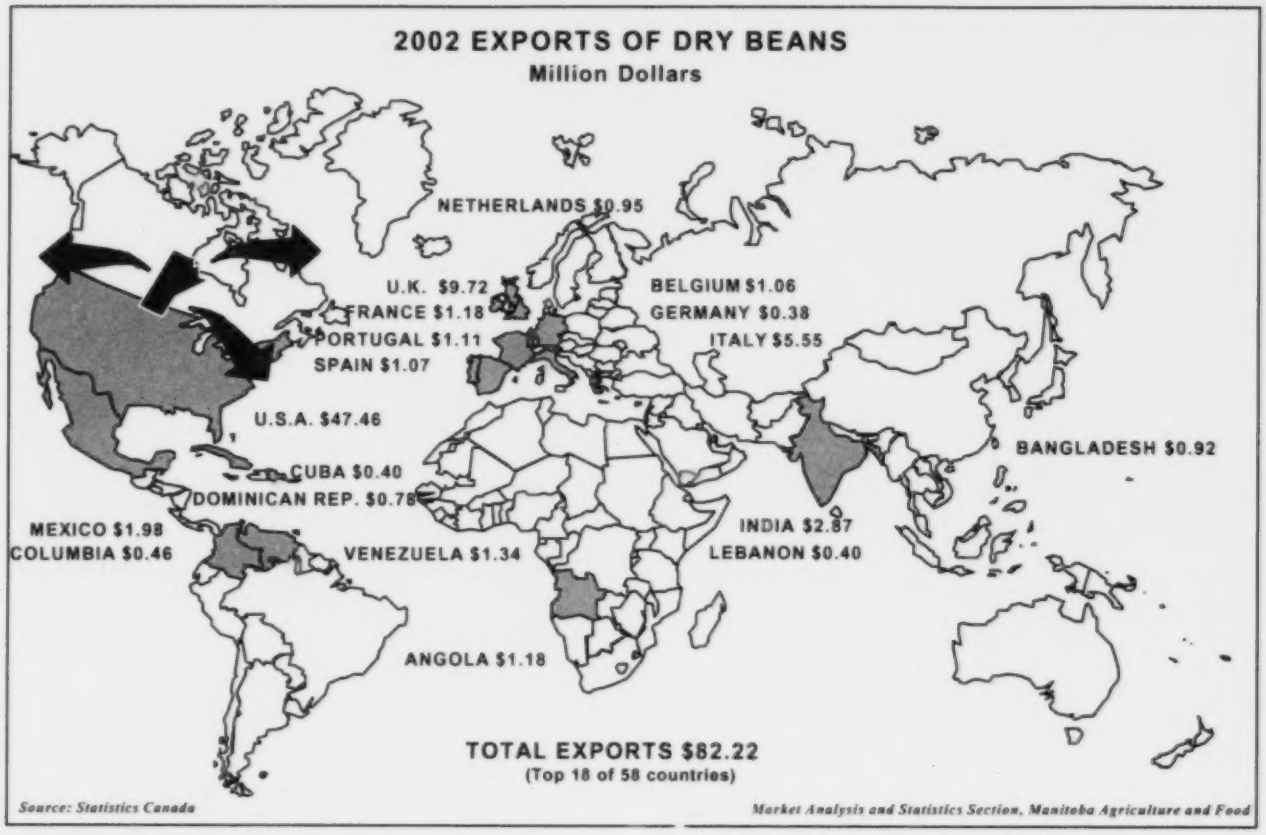
Market Analysis and Statistics Section, Manitoba Agriculture and Food

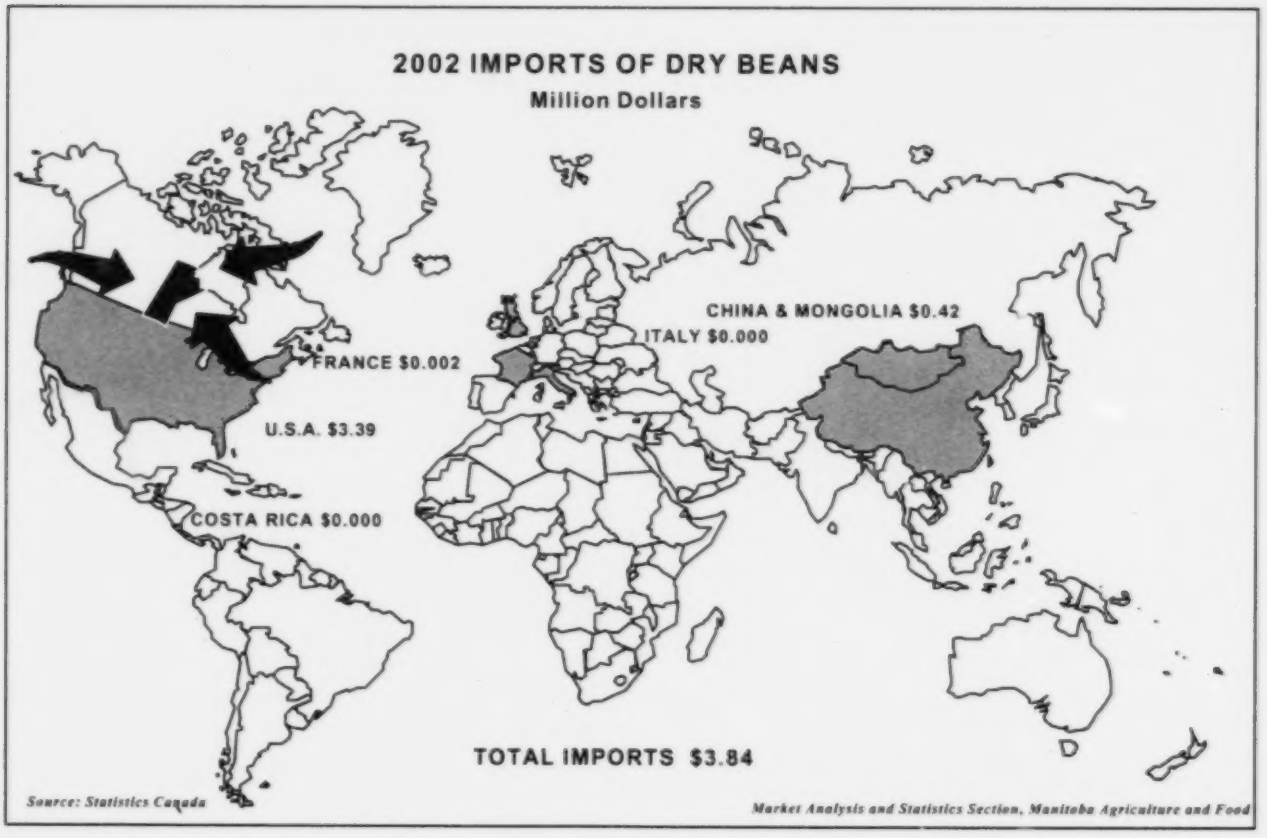
MANITOBA DRY BEAN EXPORTS
TO OTHER COUNTRIES, 1993- 2002



Source: Statistics Canada

Market Analysis and Statistics Section, Manitoba Agriculture and Food


2002 EXPORTS OF DRY BEANS
Million Dollars
NETHERLANDS $0.95
U.K. $9.72
FRANCE $1.18
PORTUGAL $1.11
SPAIN $1.07
BELGIUM $1.06
GERMANY $0.38
ITALY $5.55
U.S.A. $47.46
CUBA $0.40
DOMINICAN REP. $0.78
MEXICO $1.98
COLUMBIA $0.46
VENEZUELA $1.34
ANGOLA $1.18
INDIA $2.87
LEBANON $0.40
BANGLADESH $0.92
TOTAL EXPORTS $82.22
(Top 18 of 58 countries)
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


2002 IMPORTS OF DRY BEANS
Million Dollars
FRANCE $0.002
U.S.A. $3.39
COSTA RICA $0.000
CHINA & MONGOLIA $0.42
ITALY $0.000
TOTAL IMPORTS $3.84
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

DRY PEA SECTOR

DRY PEA SECTOR PROFILE

Production:

Although Manitoba producers grew dry peas between 1908 and 1912, the seeded area was less than 2,000 acres. There was little to no dry pea production during the First World War, but production started again in 1919. Over the past 80 years, the area seeded to peas varied from as low as 500 acres in 1931 to as high as 260,000 acres in 1998.

Harvested area and production of the crop were record high in 1998 with 255,000 acres and 8.3 million bushels respectively, but were at 135,000 acres and 5.1 million bushels in 2003. About 85 percent of Manitoba's pea plantings are yellow pea varieties, over 12 percent are green varieties with the balance sown to other pea types. Dry pea yields were record high at 39.3 bushels per acre in 2000, declined to 32.5 bushels per acre in 2002, but rose to 37.4 bushels per acre in 2003. The 10-year average yield was 34.2 bushels per acre.

Manitoba produced 6.5 percent of the Western Canadian dry pea crop in 2003, down from 21.6 percent in 1992. Peas are not grown in Eastern Canada. There are agronomic benefits to dry pea production. While the focus in earlier years was on food-quality peas, now much of the crop is used for feed.

Average dry pea prices have ranged between $3.67 and $6.80 per bushel since 1973. The value of dry pea production fell from $33.2 million in 1998 to $12.4 million in 1999 as unprofitable prices had discouraged many producers from growing peas. Average prices for the 2001 and 2002 crops rose to $4.86 and $5.49 per bushel respectively. Higher prices and the larger pea crop in 2002 resulted in a 36.8 percent rise in production value to $35.7 million. Lower expected average pea prices and a smaller crop in 2003 will lower the value of production.

Marketing:

Manitoba markets primarily yellow peas for food and livestock feed along with smaller amounts of green peas. Annual cash receipts for the sector increased from $12.2 million in 1993 to $27.7 million in 1998, fell to $14.8 million in 2000, but rose over the next two years to a record $29.4 million in 2002. Manitoba's contribution to Canadian dry pea receipts fell from 23.3 percent in 1992 to 5.5 percent in 2000, but rose to 11.6 percent in 2002.

Processing:

Peas are cleaned, split and bagged by companies such as AgPro/Saskatchewan Wheat Pool, Agricore United, Agri-Tel Grain, Alfred C. Toepfer Canada, Berdex Canada, Brett Young Seeds, Cargill, Cloutier Agra Seeds, ConAgra Grain Canada, Finora Canada Ltd., Horizon Agro, James Richardson International, Linear Grain, Louis Dreyfus Canada, N.M. Patterson & Sons, Parent Seed Farms, Parrheim Foods, Parrish & Heimbecker, Prairieland Grain, Prairie Mountain Grain, Roy Legumex, S.S. Johnson Seeds, Tri-Lake Agri, W.G. Thompson and Walker Seeds.

The main processor of Manitoba peas is Parrheim Foods, a division of Parrish and Heimbecker. The plant at Portage la Prairie produces whole peas, split peas, pea flour, protein, starch and fibre as well as fat replacers. The P. & H. plant in Saskatoon supplies 500 tonnes per year of pea starch and protein for further refining at the Manitoba plant. Best Cooking Pulses, Inc. in Portage la Prairie produce fine and coarse pea hull fibre, while Glenlochar Kitchens in Miniota and Eidse Family Farms in Morris produce consumer packages of soup mixes, which use peas.

Peas are used in hog rations as an alternative protein source to soy and canola meal.

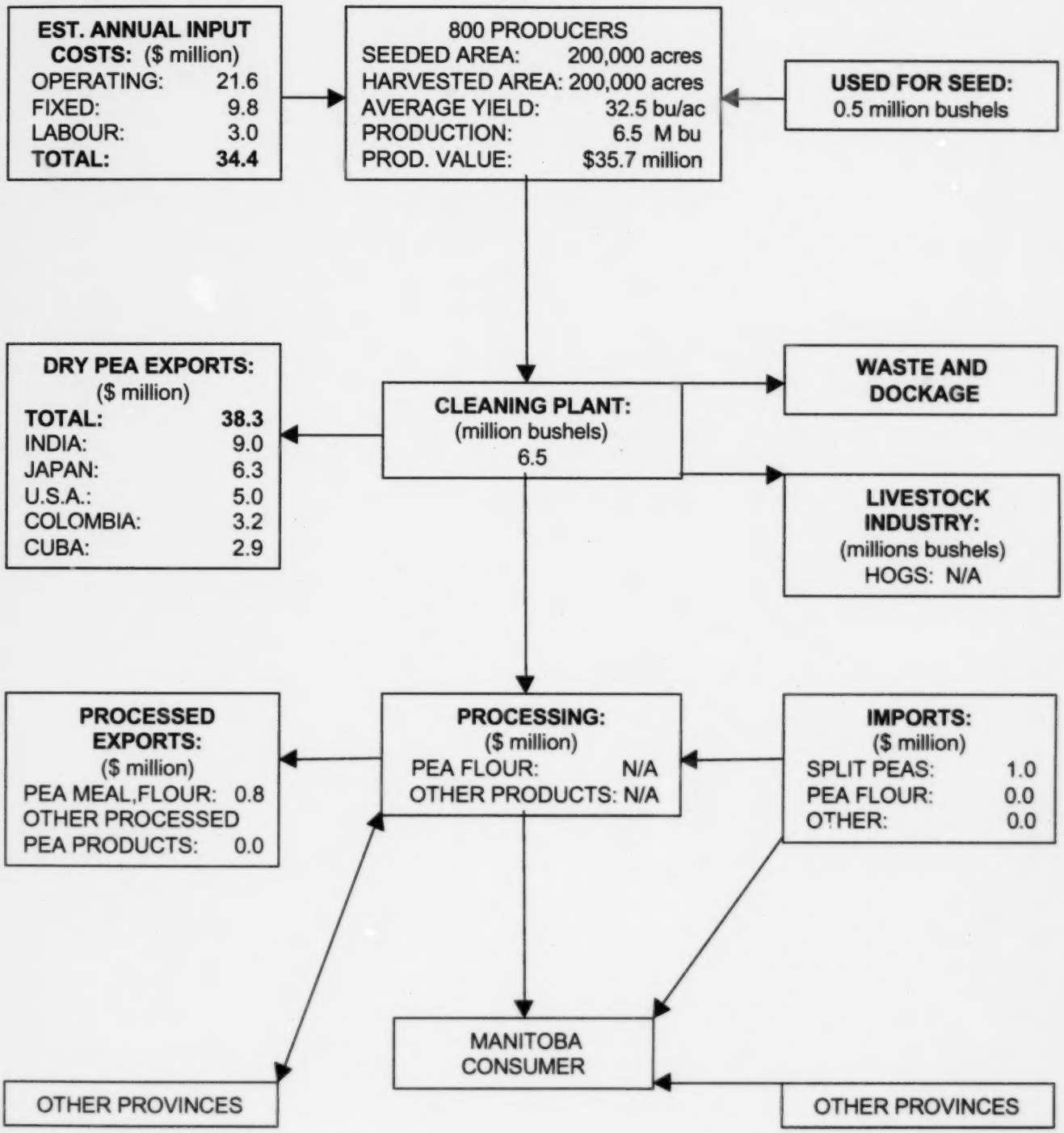
Trade:

Some of Manitoba's food-quality peas may be shipped to canneries in Eastern Canada, but most of the food pea exports are shipped to 59 countries such as India, Japan, Cuba, the United States and Colombia. Dry pea exports amounted to $38.3 million in 2002. Small amounts of pea flour are exported to countries such as the USA and the United Kingdom. Manitoba imported about $1.0 million of split peas in 2002, mostly from the USA.

DRY PEAS AND DRY PEA PRODUCTS SECTOR

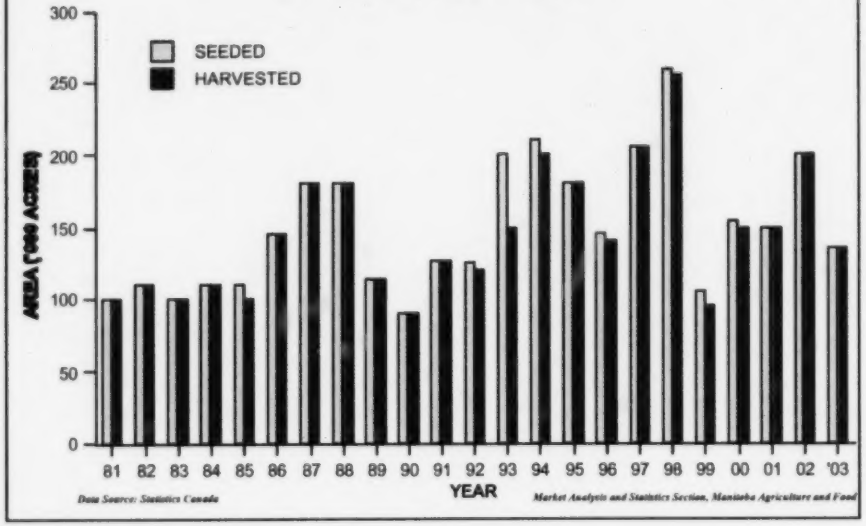
	1999	2000[R]	2001[R]	2002[R]	2003[P]	'03 as a % of '02
Estimated Number of Farms	900	1,000	740	800	700	88
CROP PRODUCTION:						
Seeded Area ('000 acres):	105	155	150	200	135	68
% of Canada	5.0	5.1	4.5	6.2	4.2	
Harvested Area ('000 acres):	95	150	150	200	135	68
Yield/acre (bushels)	35.6	39.3	35.8	32.5	37.4	115
Production (million bu):	3.4	5.9	5.4	6.5	5.1	78
% of Canada	4.1	5.6	7.2	13.0	6.5	
Average Price ($/bu):	3.67	3.73	4.86	5.49		
VALUE OF CROP PRODUCTION ($ million):	12.4	22.0	26.1	35.7		
EST. TOTAL EXPENSES ($/acre):	195.42	177.82	178.40	172.00	196.44	114
CASH RECEIPTS ($ million):	16.2	14.8	19.2	29.4		
% of Canada	6.2	5.5	6.3	11.6		
CROP DISPOSITION (million bu):	3.8	6.1	5.6	6.7		
Marketings	2.7	4.7	4.3	5.1		
Seed Requirements	0.4	0.4	0.5	0.6		
Feed, Waste & Dockage	0.4	0.8	0.7	0.7		
Carryover, July 31	0.2	0.3	0.2	0.3		
EXPORTS ($ million):	37.0	44.8	68.6	39.0		
Dry, shelled peas	36.8	44.4	68.2	38.3		
Pea meal, flour, etc.	0.2	0.4	0.4	0.8		
IMPORTS ($ million):	0.60	0.56	1.69	0.98		
Dry, shelled peas	0.59	0.54	1.69	0.98		
Pea meal, flour, etc.	0.01	0.02	0.00	0.00		

DRY PEA INDUSTRY CHART, 2002

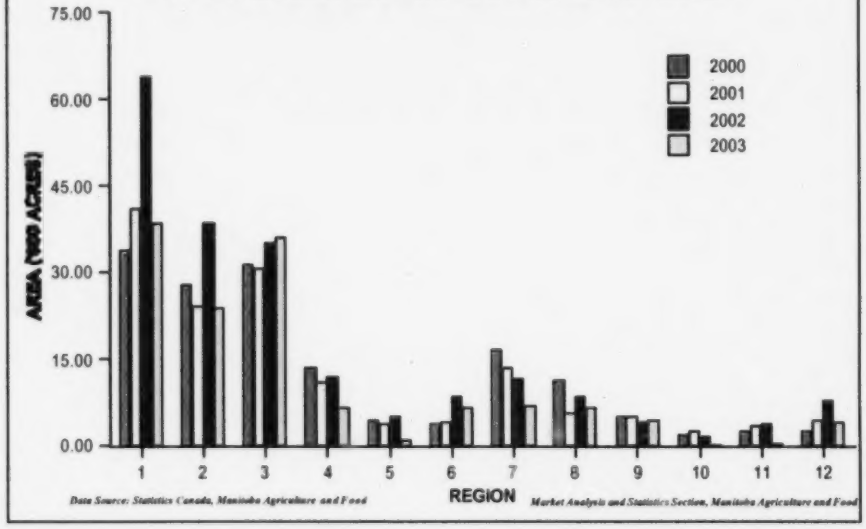


DATA SOURCE: Manitoba Agriculture, Food and Rural Initiatives, Statistics Canada, Agriculture & Agri-Food Canada

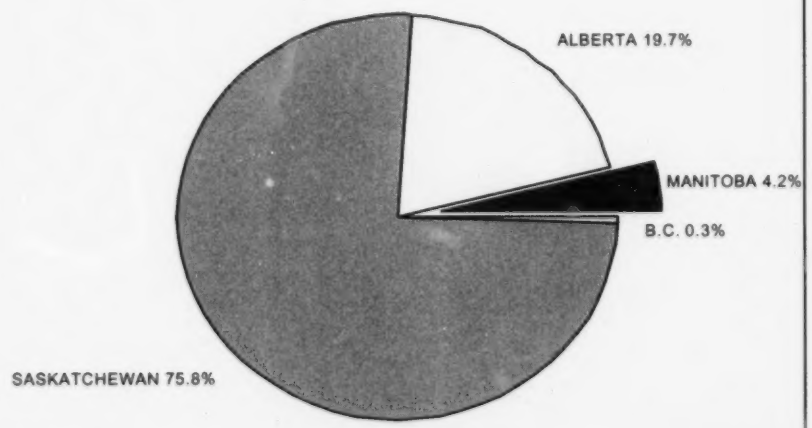
SEEDED & HARVESTED AREA OF DRY PEAS BY YEAR, 1981- 2003



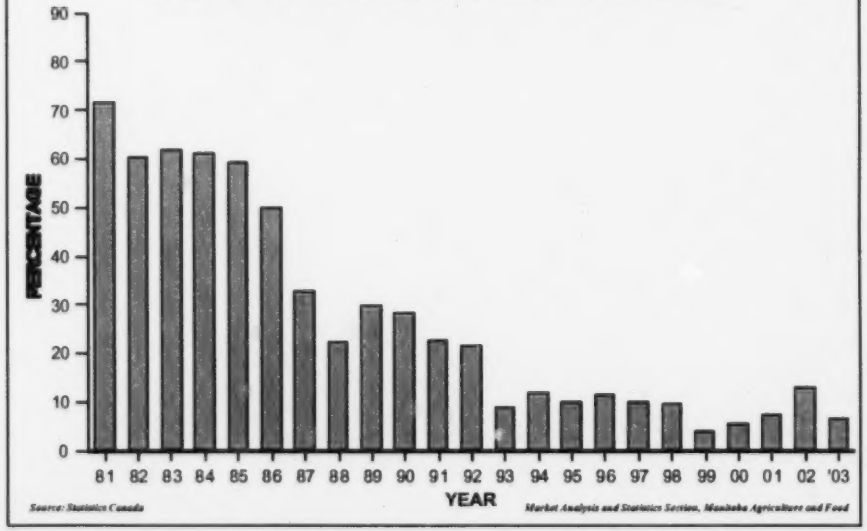
SEEDED AREA OF DRY PEAS BY AGRICULTURAL REGION, 2000- 2003



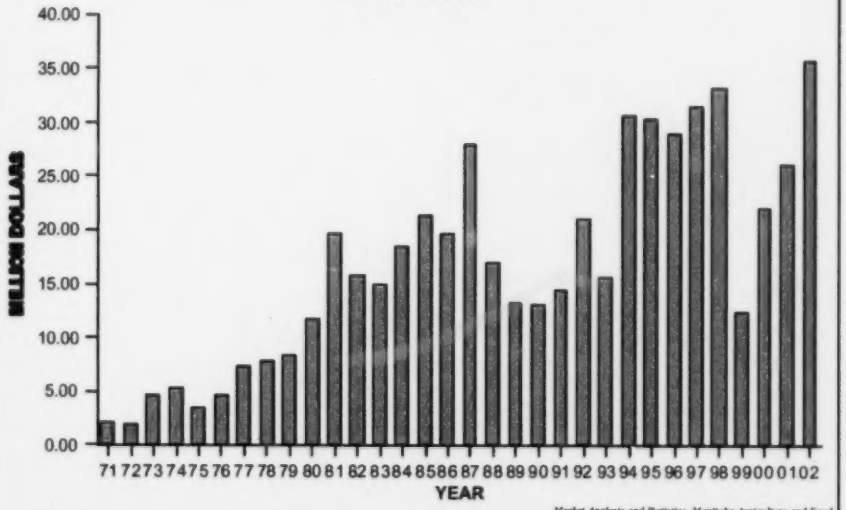
AREA OF DRY PEAS SEEDED BY PROVINCE, 2003



DRY PEA PRODUCTION AS A PERCENTAGE OF CANADIAN PRODUCTION, 1981- 2003

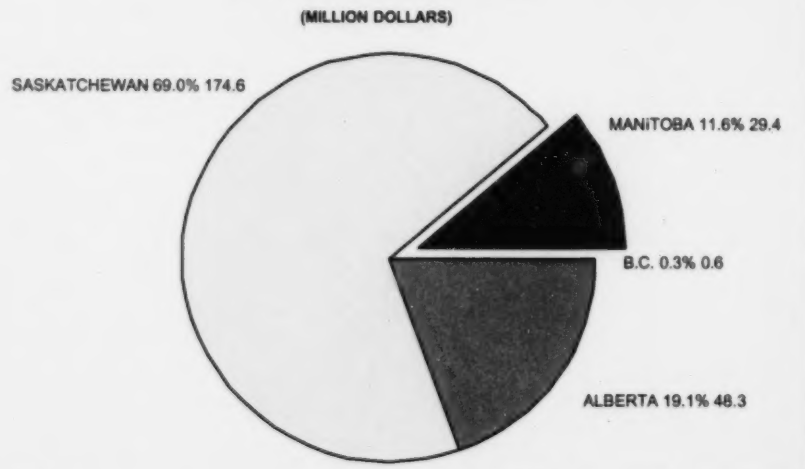


FARM VALUE OF DRY PEA PRODUCTION
1971- 2002



Market Analysis and Statistics, Manitoba Agriculture and Food

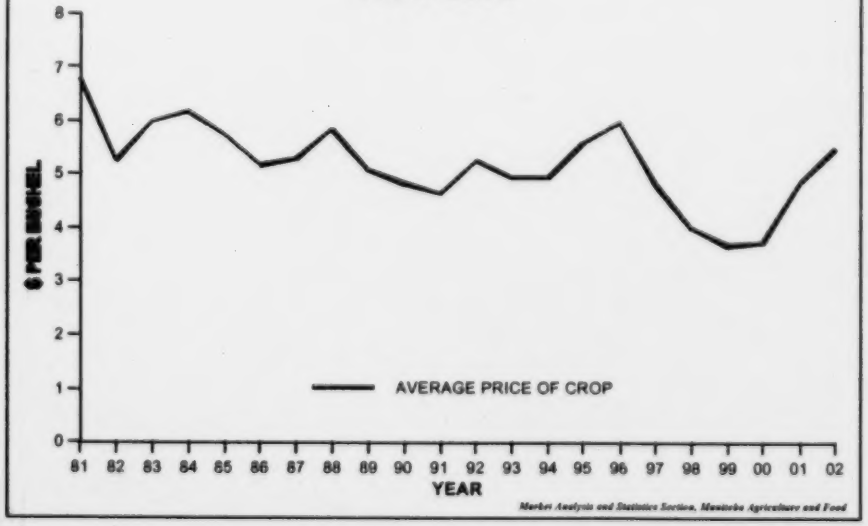
FARM CASH RECEIPTS FROM DRY PEAS
BY PROVINCE, 2002



Source: Statistics Canada

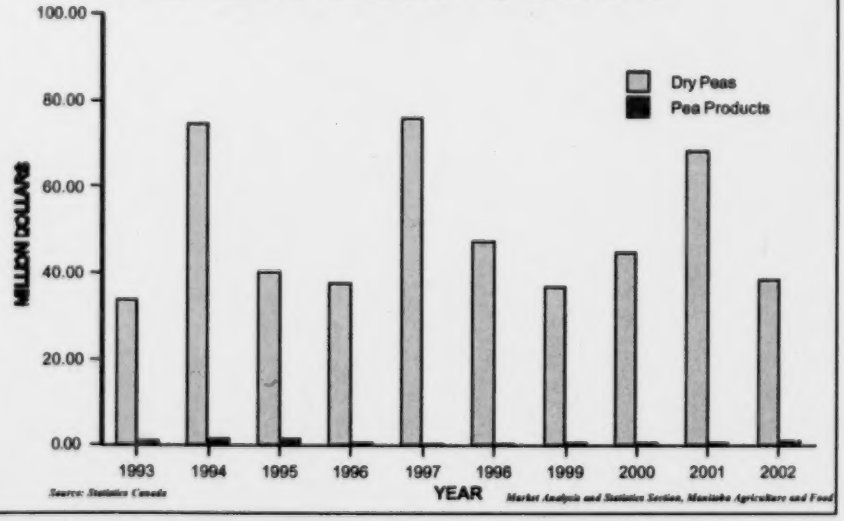
Market Analysis and Statistics Section, Manitoba Agriculture and Food

DRY PEA PRICES
1981- 2002



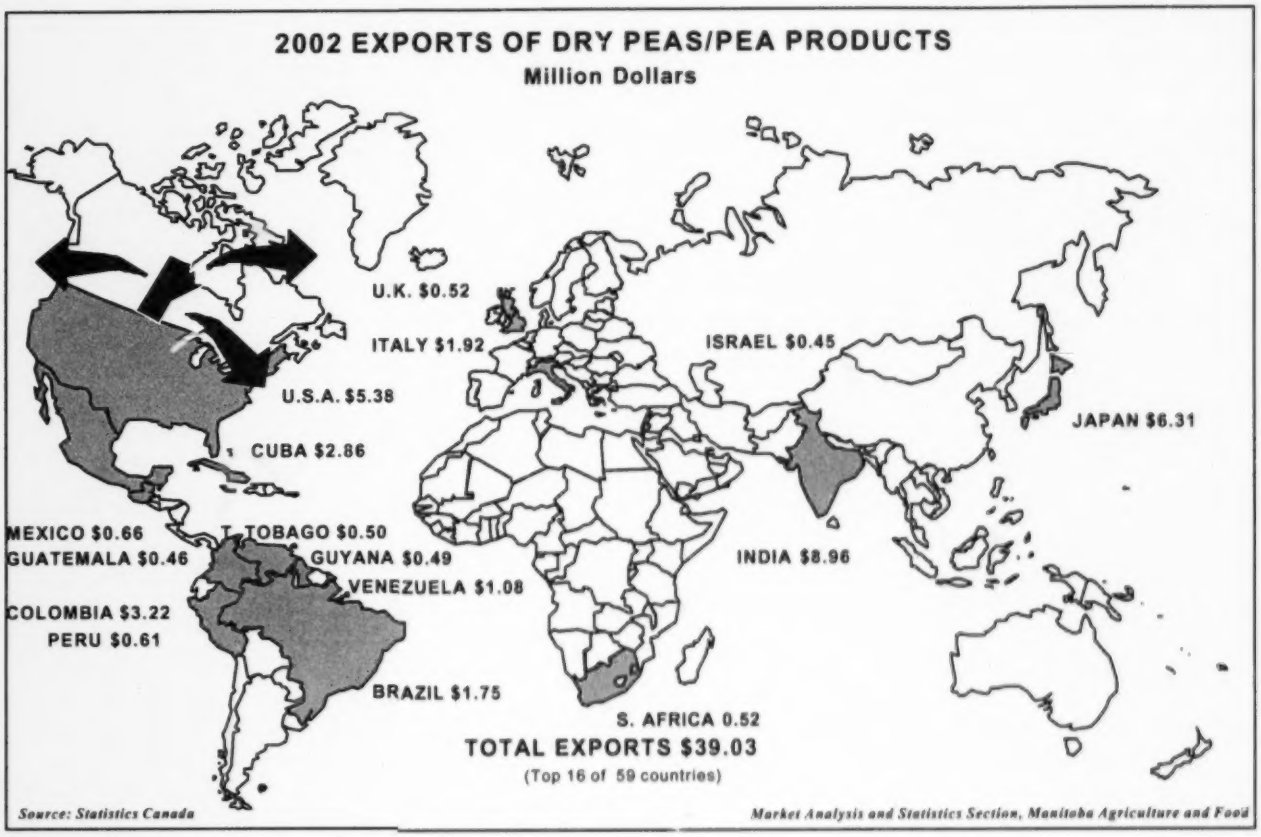
Market Analysis and Statistics Section, Manitoba Agriculture and Food

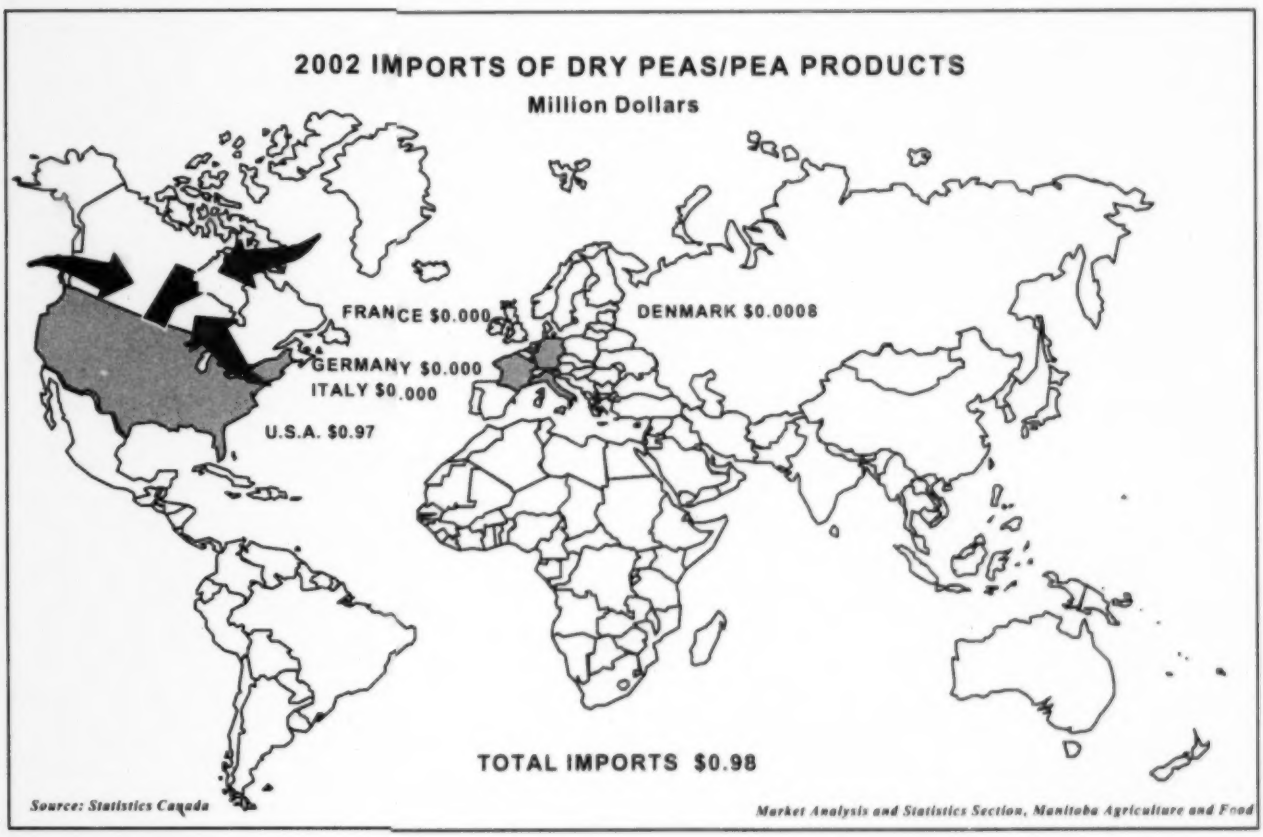
MANITOBA DRY PEA AND PRODUCT EXPORTS
TO OTHER COUNTRIES, 1993- 2002



Source: Statistics Canada

Market Analysis and Statistics Section, Manitoba Agriculture and Food


2002 EXPORTS OF DRY PEAS/PEA PRODUCTS
Million Dollars
U.K. $0.52
ITALY $1.92
ISRAEL $0.45
U.S.A. $5.38
JAPAN $6.31
CUBA $2.86
MEXICO $0.66
TOBAGO $0.50
GUATEMALA $0.46
GUYANA $0.49
INDIA $8.96
VENEZUELA $1.08
COLOMBIA $3.22
PERU $0.61
BRAZIL $1.75
S. AFRICA 0.52
TOTAL EXPORTS $39.03
(Top 16 of 59 countries)
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


2002 IMPORTS OF DRY PEAS/PEA PRODUCTS
Million Dollars
FRANCE $0.000
DENMARK $0.0008
GERMANY $0.000
ITALY $0.000
U.S.A. $0.97
TOTAL IMPORTS $0.98
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

FABABEAN SECTOR

FABABEAN SECTOR PROFILE

Production:

As a legume, fababeans (also known as horse beans or favabeans) are important in crop rotation. Fababeans are well adapted to clay or clay loam soils with good moisture, providing surface drainage is effective.

Commercial production of fababeans began in the early 1970s in Manitoba with 2,000 acres seeded and harvested in 1972. By 1980, the seeded area had increased to a record 22,000 acres, but the area dropped significantly in the 1980s and 1990s. However, production peaked at 38.4 million pounds in 1987 from an area of 16,000 acres. About 10,000 acres of fababeans were seeded and harvested in 2002, producing 18.5 million pounds of beans. The area remained at 10,000 acres in 2003, but production decreased to 14.5 million pounds. Most of Manitoba's fababean production takes place in the south-central area of the province. Manitoba had 83 percent of the seeded and harvested area in Canada in 2003, whereas Alberta had 17 percent.

Average fababean yields were record high at 2,700 pounds per acre in 1996, but were at a 30-year low of 800 pounds per acre in 1974 and 1989. Yields fell to 1,450 pounds per acre in 2003 from 1,850 pounds per acre in 2002. This was 26.8 percent below the 10-year average of 1,980 pounds per acre.

Manitoba produced 78.4 percent of the Canadian fababean crop in 2003, well below the 92.5 percent share in 2002. All commercial fababean production takes place on the Prairies with 22.5 and 7.5 percent produced in Alberta in 2001 and 2002 respectively and small quantities in Saskatchewan. There are almost no fababeans produced in Eastern Canada.

Over the last thirty years, average fababean prices in Manitoba have ranged between $0.055 and $0.103 per pound. The average price of $0.08 per pound for the 2002 crop was similar to the previous year.

Farm value of the fababean crop peaked in 1987 at $2.9 million. The next most valuable crop on record was the 2000 crop worth $2.69 million. The value of the crop fell to $1.38 million in 2001, but rose to $1.56 million for the 2002 crop.

Marketing:

Fababeans are a protein-rich food for human consumption with large beans being cooked whole and smaller beans ground into meal or paste. Downgraded product is used for livestock feed. Some fababeans are harvested as high-quality forage or silage.

Processing:

Cleaning and bagging of fababeans are done by companies such as Agricore United, Finora Canada Ltd., Fisher Seeds, Master Feeds Dauphin, Parent Seed Farms Ltd., Roy Legumex Inc. and S.S. Johnson Seeds.

There is minimal further processing of fababeans in Manitoba.

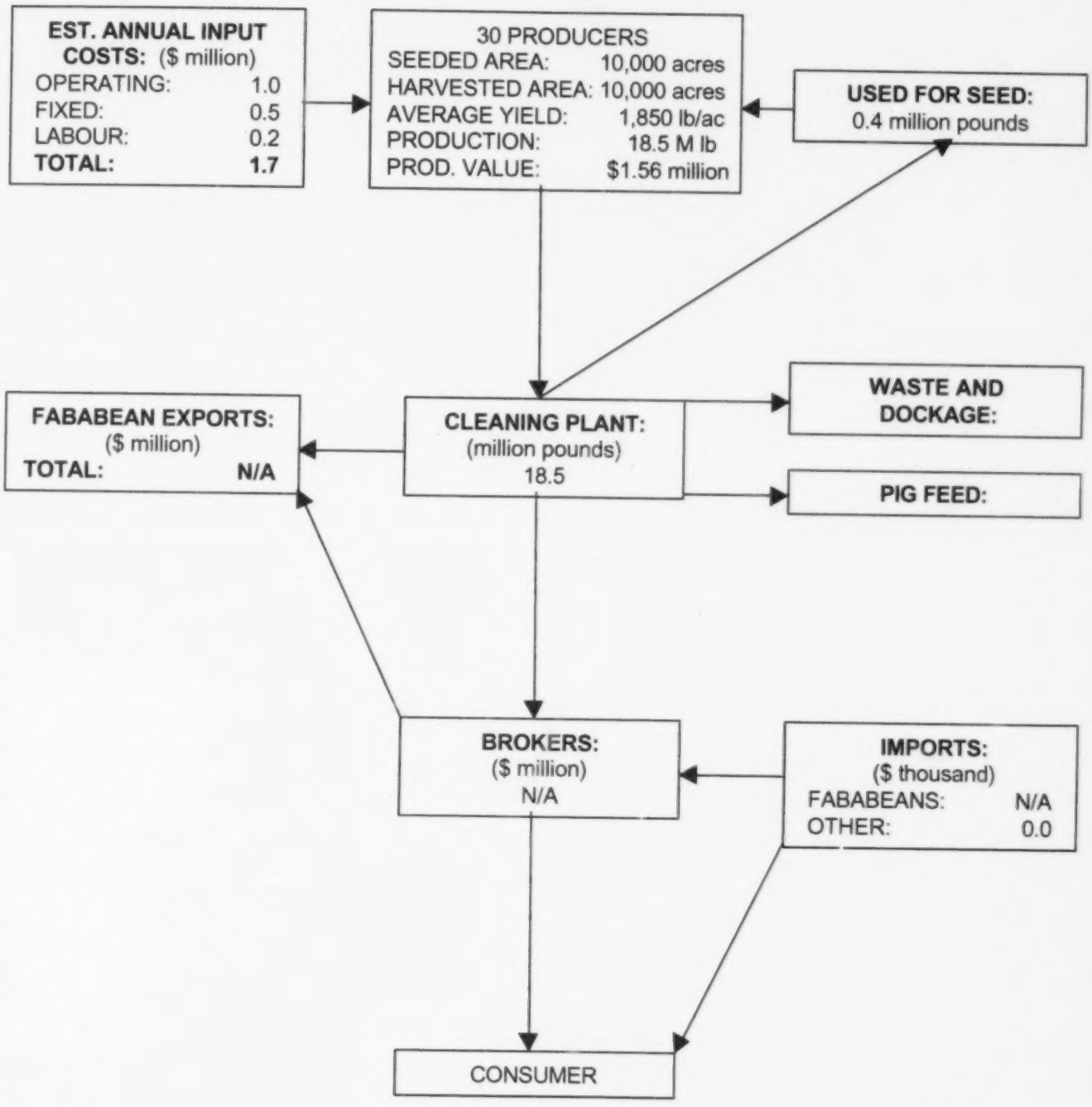
Trade:

Some of Manitoba's fababeans may be sold to Eastern Canada, but most out-of-province shipments are to the Middle East, where the beans have been grown for many centuries and are considered a dietary staple, used as a cereal, meat or dairy product substitute.

FABABEANS SECTOR

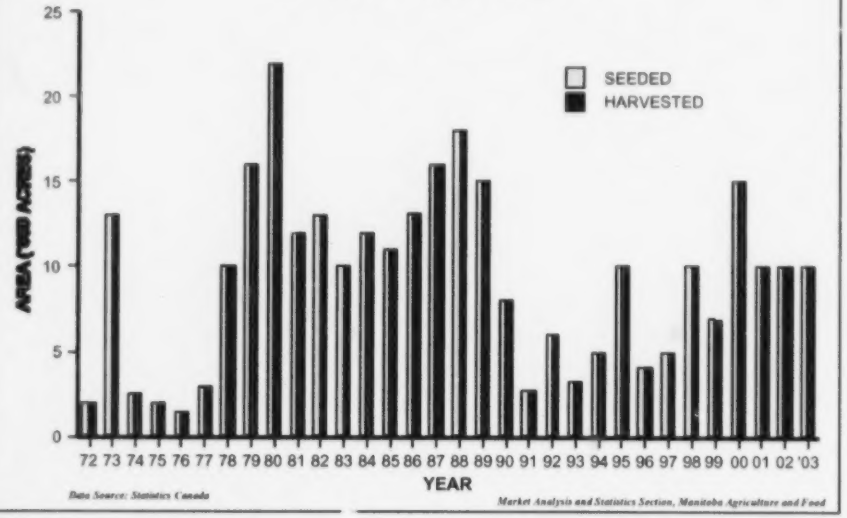
	1999	2000[R]	2001[R]	2002[R]	2003[P]	'03 as a % of '02
Estimated Number of Farms	N/A	N/A	30	30	30	100
CROP PRODUCTION:						
Seeded Area ('000 acres):	7.0	15.0	10.0	10.0	10.0	100
% of Canada	N/A	N/A	77	77	83	
Harvested Area ('000 acres):	6.9	15.0	10.0	10.0	10.0	100
Yield/acre (pounds):	2,070	2,270	1,750	1,850	1,450	78
Production ('000 pounds):	14,300	34,000	17,500	18,500	14,500	78
% of Canada	100	100	77.4	92.5	78.4	
Average Price ($/pound):	0.075	0.079	0.080	0.080		
VALUE OF PRODUCTION ($ million):	1.07	2.69	1.38	1.56		
ESTIMATED TOTAL EXPENSES ($/acre):	N/A	177.82	178.40	172.00	196.44	114

FABABEAN INDUSTRY CHART, 2002



DATA SOURCE: Manitoba Agriculture, Food and Rural Initiatives, Statistics Canada, Agriculture & Agri-Food Canada

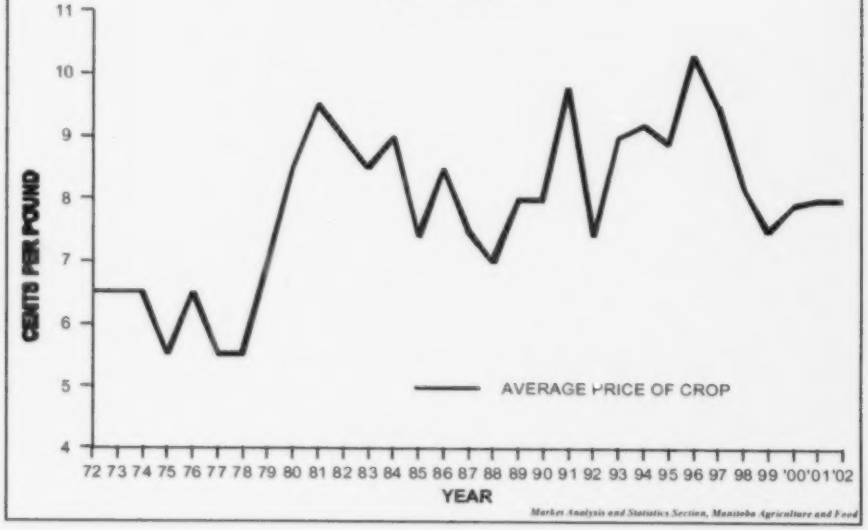
SEEDED & HARVESTED AREA OF FABABEANS BY YEAR, 1972- 2003



Data Source: Statistics Canada

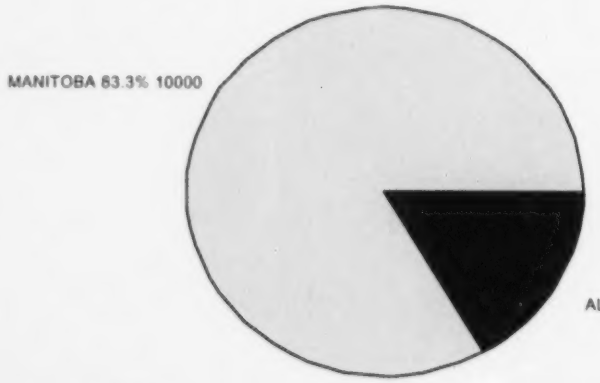
Market Analysis and Statistics Section, Manitoba Agriculture and Food

FABABEAN PRICES 1972- 2002



Market Analysis and Statistics Section, Manitoba Agriculture and Food

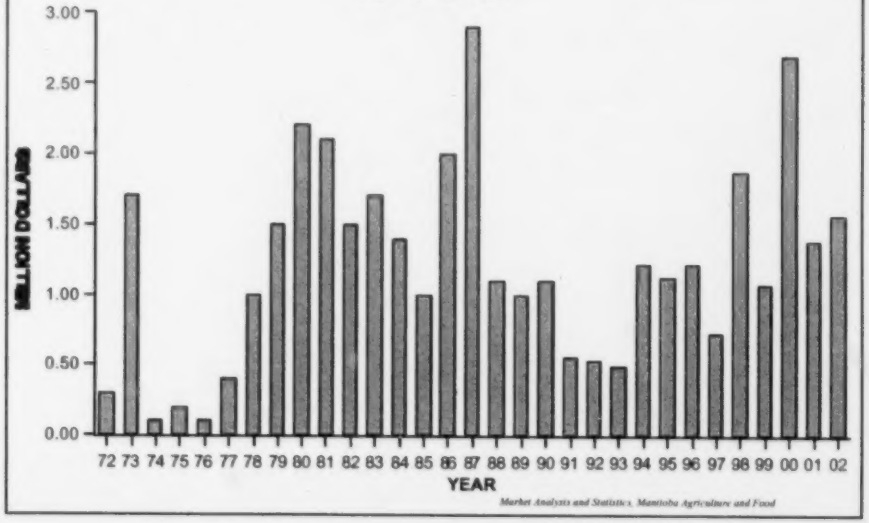
AREA OF FABABEANS SEEDED BY PROVINCE, 2003



Source: Statistics Canada

Market Analysis and Statistics Section, Manitoba Agriculture and Food

FARM VALUE OF FABABEAN PRODUCTION 1972- 2002



Market Analysis and Statistics, Manitoba Agriculture and Food

LENTIL SECTOR

LENTIL SECTOR PROFILE

Production:

Commercial production of lentils began in the early 1970s in Manitoba with 2,500 acres seeded and harvested in 1972. By 1979, the seeded area had increased to 17,100 acres with further significant increases occurring in the 1990s. As a legume, lentils are important in crop rotation. A record 155,000 acres of lentils were seeded and harvested in 1992 and produced 175 million pounds of lentils. Uncompetitive prices led to reduced interest in lentil production and the seeded area fell to 8,000 acres in 1997. Prices improved in 1999, which led to 35,000 acres of lentils being seeded in 2000. Again in response to lower prices, the lentil area decreased to 10,000 acres in 2001. Only 500 acres of lentils were planted in 2002, but the area increased to 4,000 acres in 2003, all of which was harvested. Normally most of Manitoba's lentil plantings are the small lentils (Eston) with yellow cotyledon (colour showing when split in half) with the remainder being the larger yellow type (Laird) lentils.

Average lentil yields were record high at 1,527 pounds per acre in 1990, but fell to a 22-year low of about 500 pounds per acre in 2002. Yields rose to 1,500 pounds per acre in 2003, triple the 2002 yield and 31 percent above the 10-year average of 1,145 pounds per acre. Production was 6.0 million pounds in 2003, well above 0.16 million pounds in 2002.

Manitoba produced about 0.5 percent of the Canadian lentil crop in 2003, down from 22.7 percent in 1992. All commercial lentil production takes place on the Prairies with over 98 percent in Saskatchewan. There are almost no lentils produced in Eastern Canada.

Over the last thirty years, average lentil prices have ranged between $0.05 and $0.35 per pound. The average price of $0.13 per pound for the 2002 crop was up by 8.3 percent from the previous year. Farm value of the crop peaked in 1992 at $23.4 million. The value of the 2002 crop was only $0.02 million, down from $5.0 million in 2000.

Marketing:

Annual farm cash receipts for the sector rose from $10.0 million in 1994 to $12.4 million in 1995, but were only $0.6 million in 2002. Manitoba's contribution to Canadian lentil receipts decreased from 10.0 percent in 1994 to 0.5 percent in 2002.

Lentils are a protein-rich food for human consumption, but downgraded product could be used for livestock feed.

Processing:

Cleaning and bagging of lentils are done by companies such as AgPro/Saskatchewan Wheat Pool, Agricore United, Alfred C. Toepfer Canada Ltd., Berdex Canada Ltd., Brett Young Seeds, Finora Canada Ltd., Horizon Agro, Parent Seed Farms Ltd., Prairieland Grain Co., Roy Legumex Inc., Walker Seeds and W.G. Thomson & Sons Ltd.

There is little further processing of lentils, but companies such as Glenlochar Kitchens in Miniota and Eidse Family Farms in Morris mix lentils with other legumes and rice for sale as soup and stew bases.

Trade:

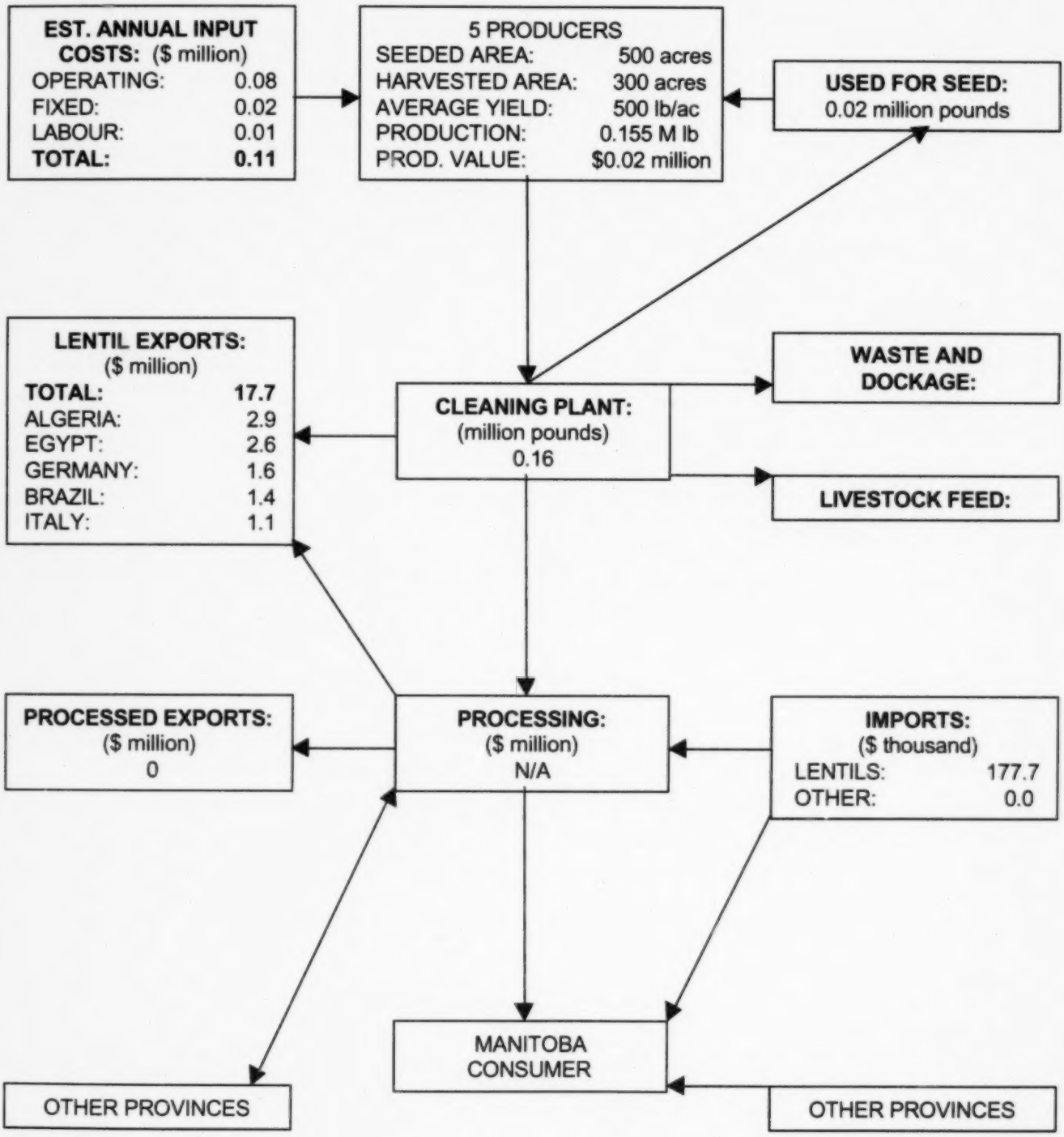
Some of Manitoba's lentils may be shipped to Eastern Canada. Manitoba's exports could include product from Saskatchewan. Almost $17.7 million of lentils were exported from Manitoba to 47 countries in 2002, including Algeria, Egypt, Brazil, Germany and Italy. Lentil exports could decline in 2003 due to the small 2002 crop.

Manitoba imported about $0.177 million of lentils in 2002, almost all from the United States.

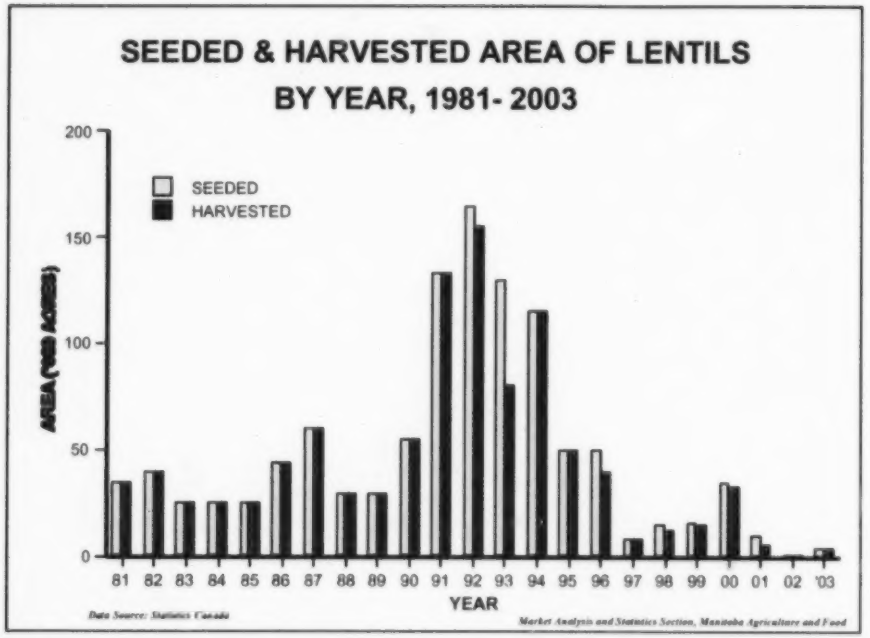
LENTIL SECTOR

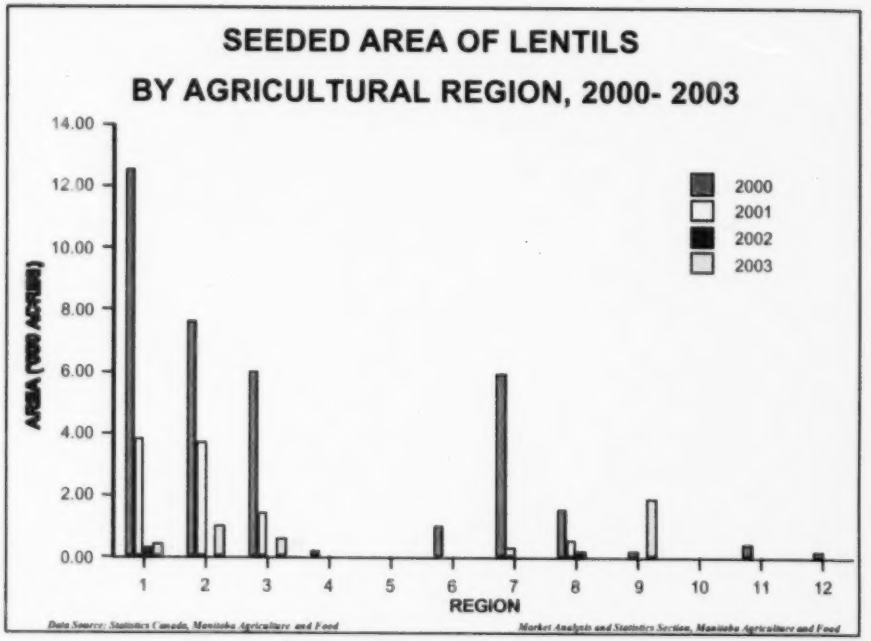
	1999	2000	2001	2002[R]	2003[P]	'03 as a % of '02
Estimated Number of Farms	40	65	45	5	20	400
CROP PRODUCTION:						
Seeded Area ('000 acres):	16	35	10	0.5	4	800
% of Canada	1.3	2.0	0.6	0.03	0.3	
Harvested Area ('000 acres):	15	33	6	0.3	4	1,333
Yield/acre (pounds):	1,292	1,076	1,250	500	1,500	300
Production (million pounds):	19.4	35.5	7.5	0.16	6.0	3,750
% of Canada	1.2	1.8	0.6	0.02	0.5	
Average Price ($/pound):	0.186	0.141	0.120	0.130		
VALUE OF PRODUCTION ($ million):	3.61	4.99	0.91	0.02		
ESTIMATED TOTAL EXPENSES ($/acre):	171.96	198.25	203.21	215.88	231.18	107
CASH RECEIPTS ($ million):	2.7	4.0	2.4	0.6		
% of Canada	1.4	1.6	1.3	0.5		
EXPORTS ($ million):	25.0	24.4	18.0	17.7		
Shelled lentils	25.0	24.4	18.0	17.7		
IMPORTS ($ thousand):	133.4	8.4	1.4	177.0		
Shelled lentils	133.4	8.4	1.4	177.0		

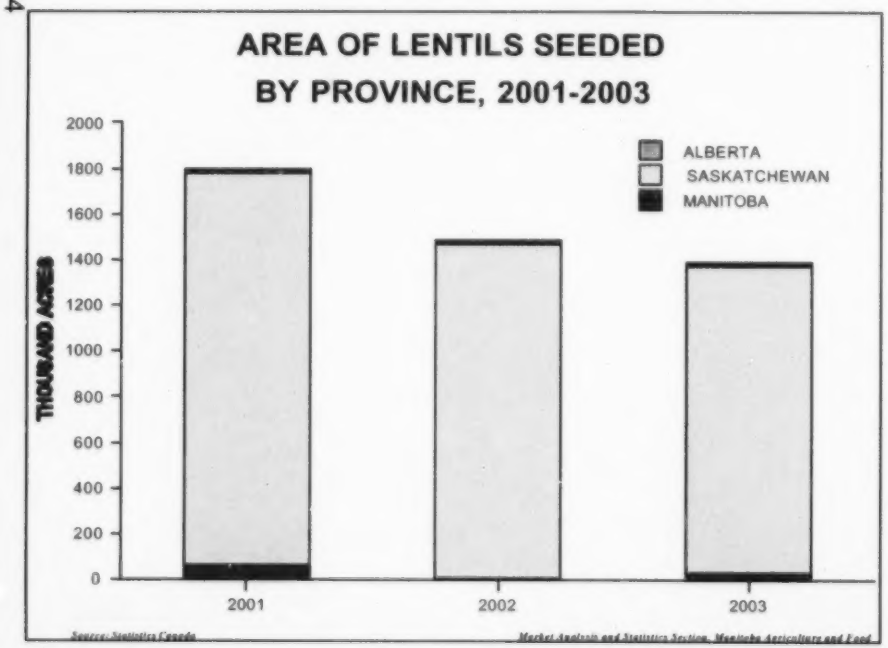
LENTIL INDUSTRY CHART, 2002

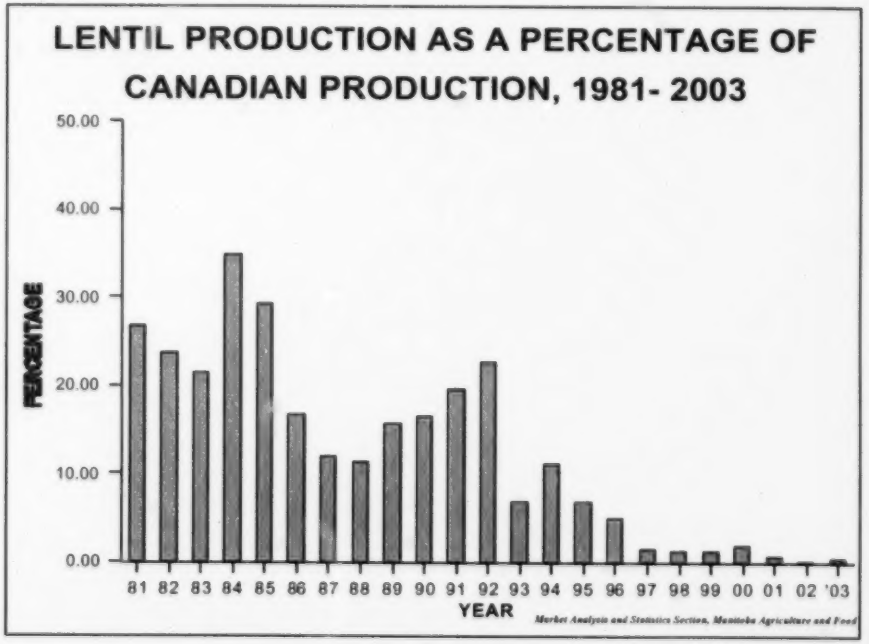


DATA SOURCE: Manitoba Agriculture, Food and Rural Initiatives, Statistics Canada, Agriculture & Agri-Food Canada

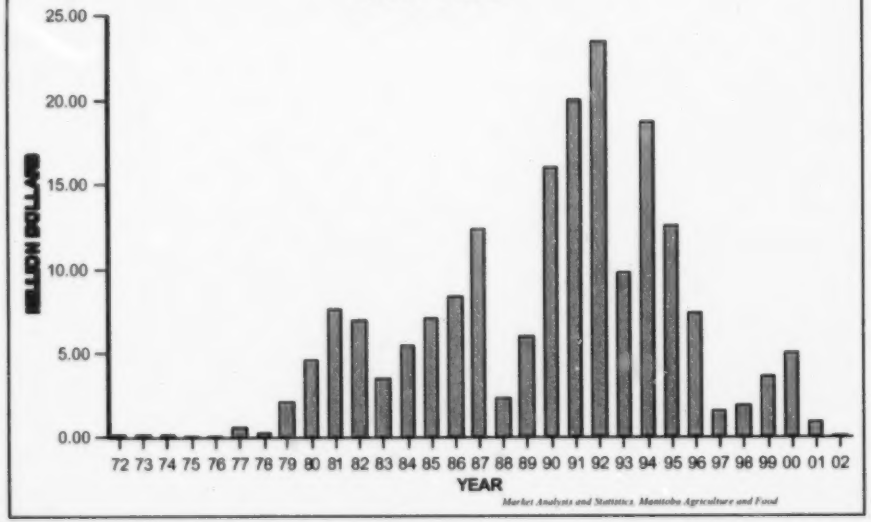

SEEDED & HARVESTED AREA OF LENTILS
BY YEAR, 1981- 2003
SEEDED
HARVESTED
AREA ('000 ACRES)
200
150
100
50
0
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00 01 02 '03
YEAR
Data Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


SEEDED AREA OF LENTILS
BY AGRICULTURAL REGION, 2000- 2003
2000
2001
2002
2003
AREA ('000 ACRES)
14.00
12.00
10.00
8.00
6.00
4.00
2.00
0.00
1 2 3 4 5 6 7 8 9 10 11 12
REGION
Data Source: Statistics Canada, Manitoba Agriculture and Food
Market Analysis and Statistics Section, Manitoba Agriculture and Food

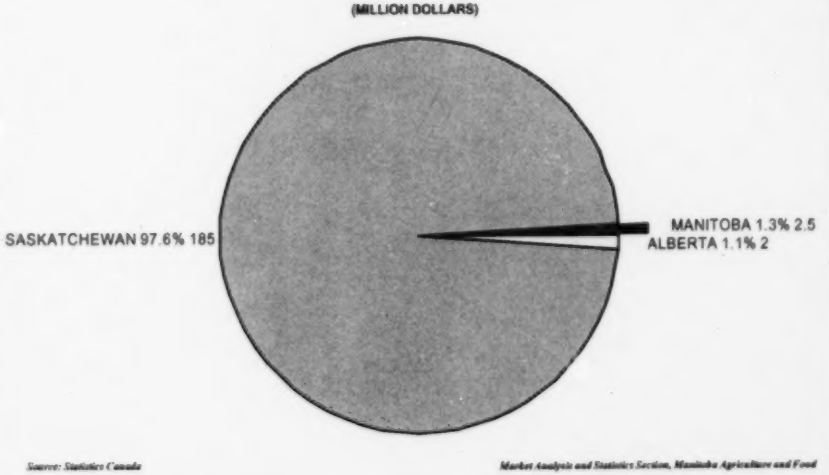

AREA OF LENTILS SEEDED
BY PROVINCE, 2001-2003
ALBERTA
SASKATCHEWAN
MANITOBA
THOUSAND ACRES
2000
1800
1600
1400
1200
1000
800
600
400
200
0
2001
2002
2003
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


LENTIL PRODUCTION AS A PERCENTAGE OF
CANADIAN PRODUCTION, 1981- 2003
PERCENTAGE
50.00
40.00
30.00
20.00
10.00
0.00
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00 01 02 '03
YEAR
Market Analysis and Statistics Section, Manitoba Agriculture and Food

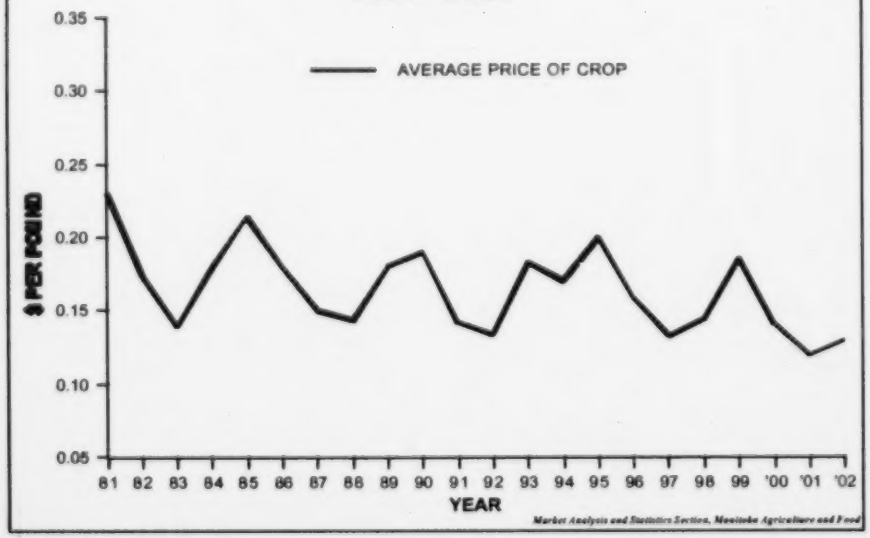
FARM VALUE OF LENTIL PRODUCTION
1972- 2002



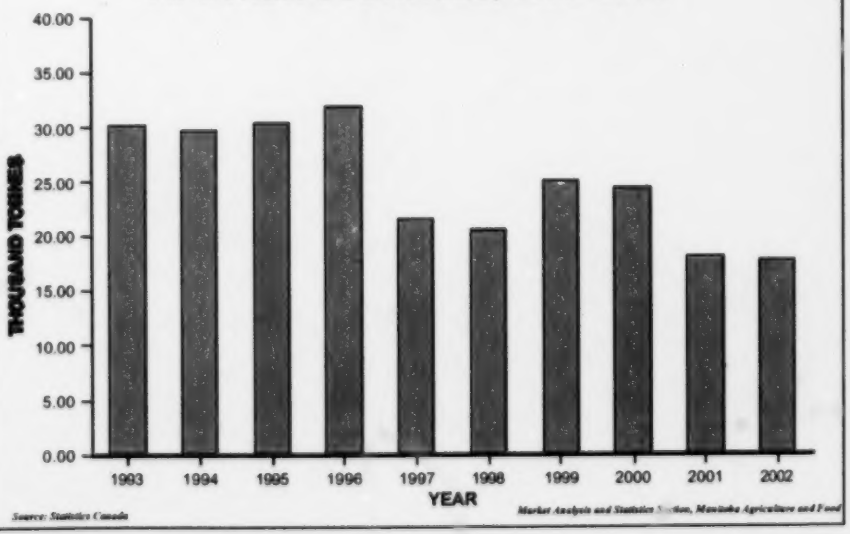
FARM CASH RECEIPTS FROM LENTILS
BY PROVINCE, 2001

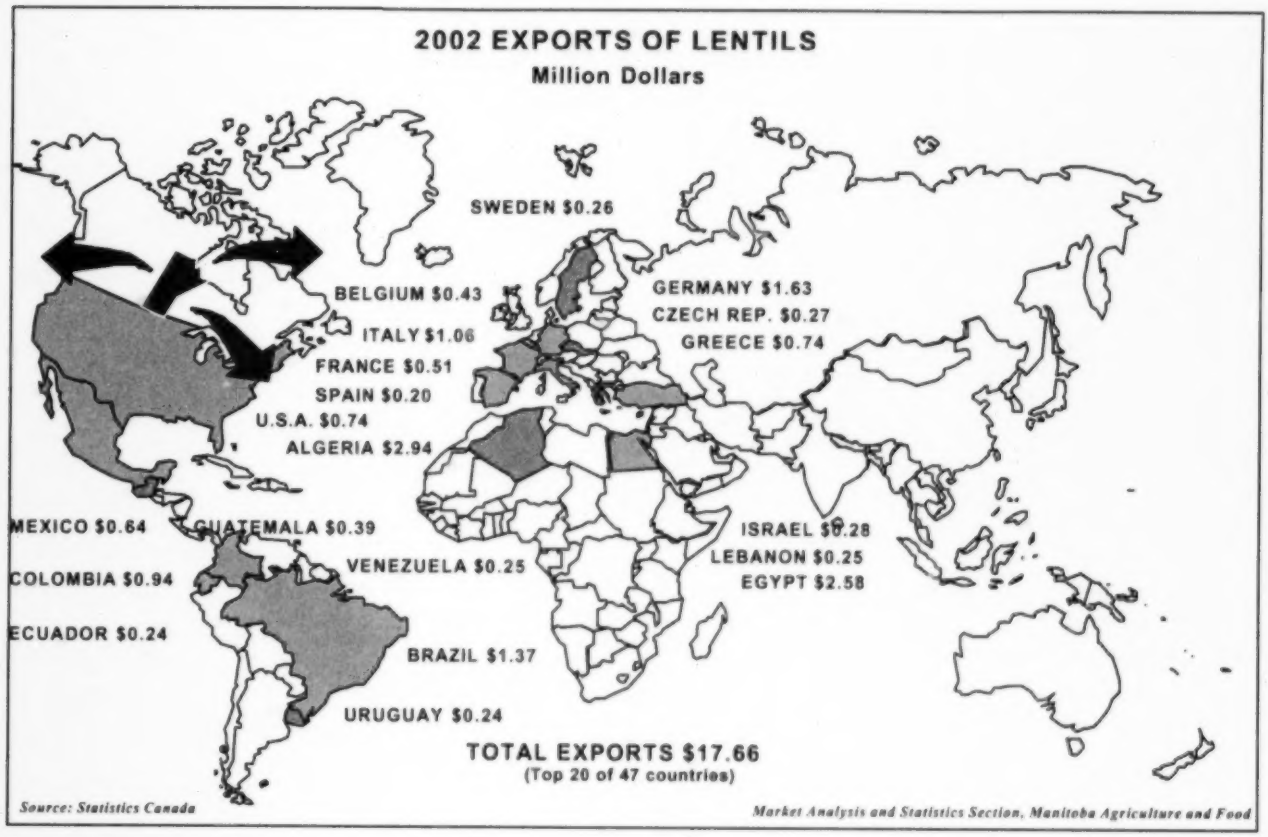


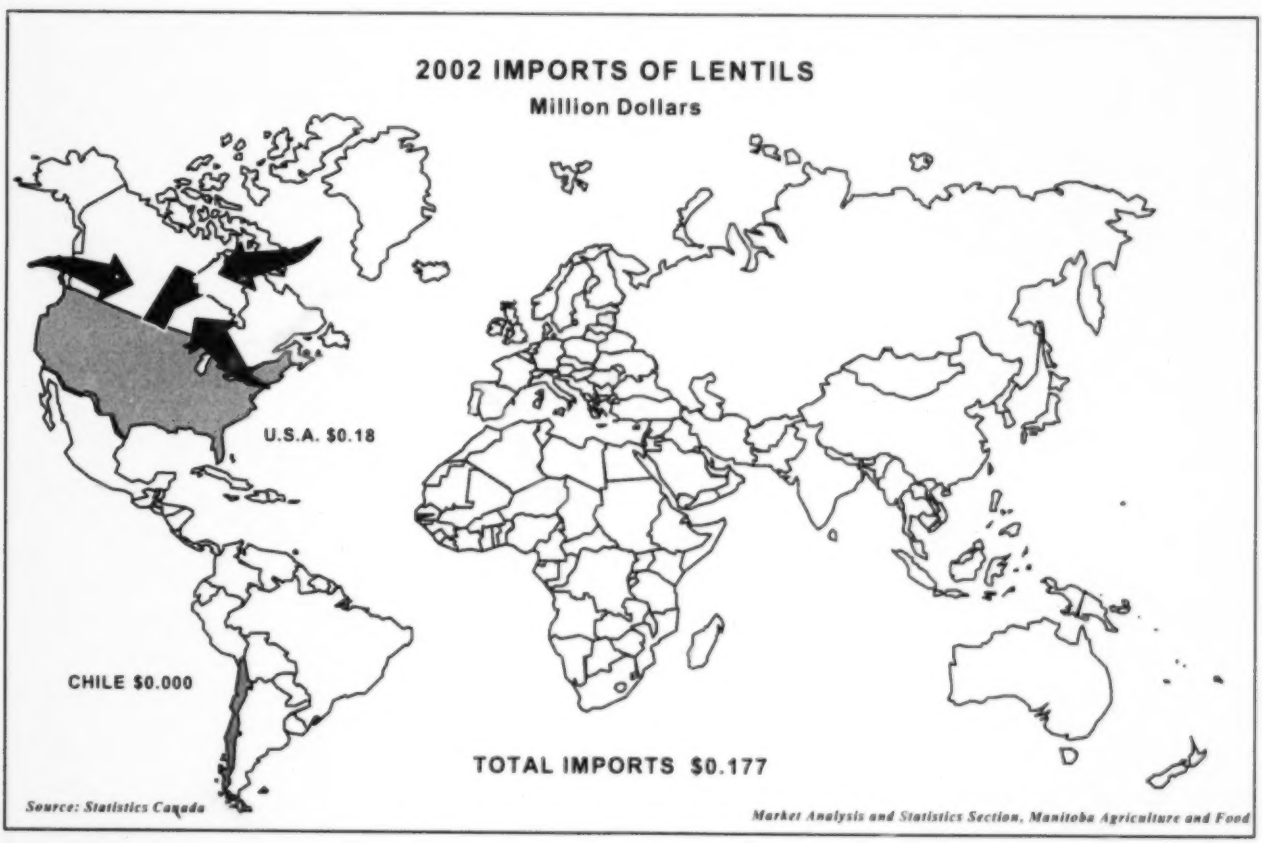
LENTIL PRICES
1981- 2002



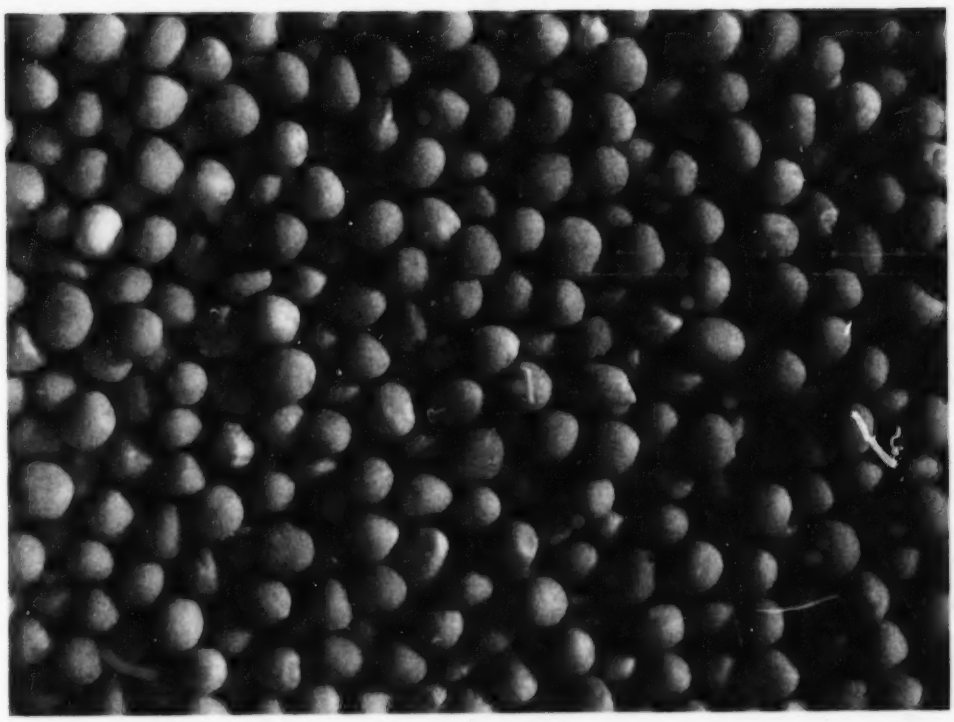
MANITOBA LENTIL EXPORTS
TO OTHER COUNTRIES, 1993- 2002




2002 EXPORTS OF LENTILS
Million Dollars
SWEDEN $0.26
BELGIUM $0.43
ITALY $1.06
FRANCE $0.51
SPAIN $0.20
U.S.A. $0.74
ALGERIA $2.94
GERMANY $1.63
CZECH REP. $0.27
GREECE $0.74
MEXICO $0.64
GUATEMALA $0.39
COLOMBIA $0.94
VENEZUELA $0.25
ECUADOR $0.24
BRAZIL $1.37
URUGUAY $0.24
ISRAEL $0.28
LEBANON $0.25
EGYPT $2.58
TOTAL EXPORTS $17.66
(Top 20 of 47 countries)
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


2002 IMPORTS OF LENTILS
Million Dollars
U.S.A. $0.18
CHILE $0.000
TOTAL IMPORTS $0.177
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

MUSTARD SEED SECTOR



MUSTARD SEED SECTOR PROFILE

Production:

Mustard seed production began in Manitoba in 1952 with 1,300 acres planted. The dry conditions of the Prairies are well suited to mustard seed production and much of the world's crop comes from Western Canada, particularly Saskatchewan. Although Manitoba grows less than 10 percent of the Canadian mustard seed crop, mustard seed is a good alternative cash crop to traditional grains and oilseeds. The harvested area of mustard seed peaked in 1968 at 65,000 acres, while ten years later production was record high at 64 million pounds. The planted area declined in the years, 1998-2000, to 10,000 acres or less. In 2003, there were 25,000 acres of mustard seeded harvested in the province, down from 30,000 acres seeded and harvested in 2002. Most of Manitoba's plantings are yellow mustard with smaller amounts of brown and Oriental mustard varieties.

Mustard seed yields were highest at 1,214 pounds per acre in 1991. Yields averaging 912 pounds per acre in 2003 were about 13 percent above the 10-year average of 806 pounds per acre. The 2003 crop of 22.8 million pounds was 3.6 percent larger than the 2002 crop.

Average mustard seed prices ranged between $0.07 and $0.182 per pound until 2001, when the average price was a record $0.31 per pound. This was slightly above the price for the 2002 crop of $0.30 per pound. The 2002 crop was valued at about $6.58 million, almost double the 2001 value of $3.45 million and six times the 2000 crop value of $1.08 million.

Marketing:

Annual cash receipts for the sector declined from $2.2 million in 1997 to $0.8 million in 2000, but increased to $1.8 million in 2001 and $5.4 million in 2002. Manitoba's contribution to Canadian mustard seed receipts rose from 0.9 percent in 1999 to 8.7 percent in 2002.

Mustard seed is delivered by producers to cleaning plants, such as Catellier Seed Service Inc. in Dufrost or Venture Seeds Ltd. (1999) in Brunkild. These companies offer contract production as well as spot price purchasing of yellow, oriental and brown mustard seed. The companies separate, clean and ship raw product to users in both the local and international markets. The cleaned seed is shipped in bags or bulk by truck or rail to mustard mills in Hamilton and Montreal in Eastern Canada or to mills in states such as North Dakota and Missouri.

Manitoba markets yellow mustard (also known as white) for processing into American hot dog mustard, which uses the whole seed for a milder product and gets its yellow colour from turmeric. It is also used in processed meats for flavour and as a high-protein extender. The Oriental varieties can be pressed into oil used for cooking in some Asian countries. Brown mustard seed produces hot mustard used in European products such as Dijon. The kernel of the seed is milled into flour for the hotter mustards. Most name brand, prepared mustards are a custom blend of yellow and Oriental mustard flour.

Processing:

Small amounts of mustard seed are processed in Manitoba. Organic, wild mustard seed is marketed by Crystal River Foods in Clearwater. Processors of prepared mustard in Manitoba include Elman's Food Products in Winnipeg.

Trade:

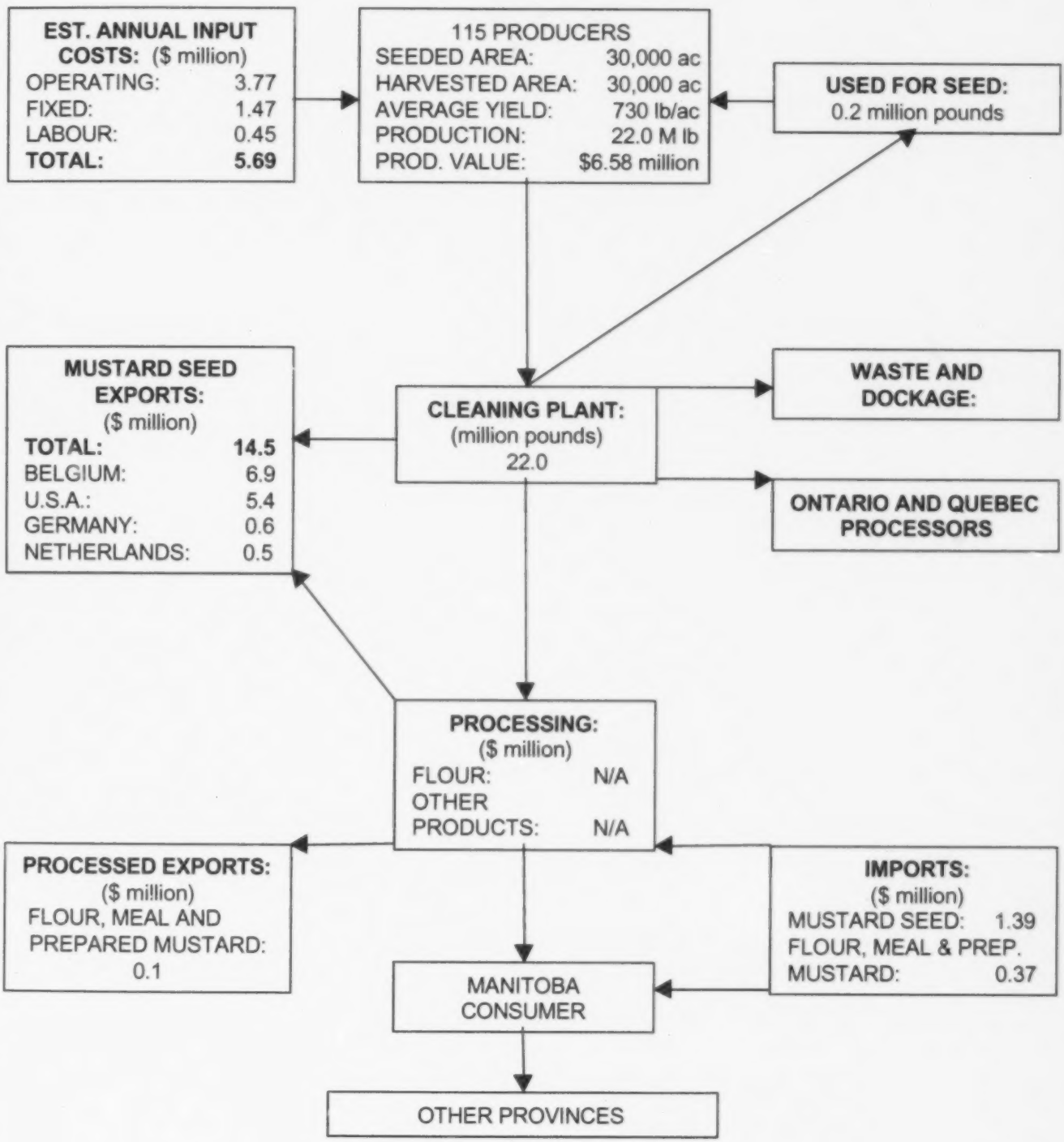
Small quantities of Manitoba's mustard seed are sent to processors in Eastern Canada. Most mustard exports, valued at $14.5 million in 2002, went to 20 countries, mainly Belgium, the United States, Germany and the Netherlands. Mustard flour and prepared mustard, valued at $50,100, were exported to countries such as the United States, Australia and Japan.

Manitoba imported about $1.39 million of mustard seed and $368,700 of mustard flour and prepared mustard in 2002, mostly from the United States.

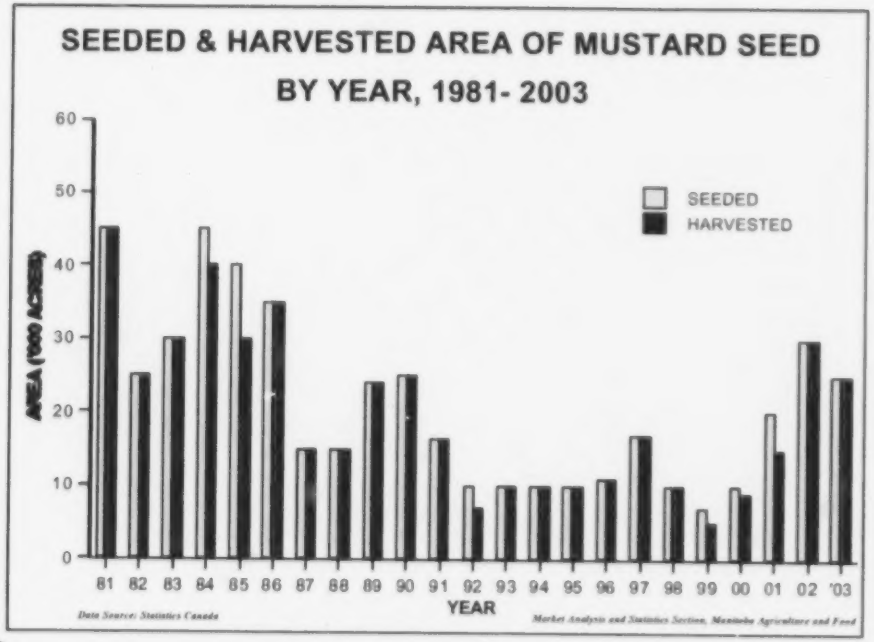
MUSTARD SEED SECTOR

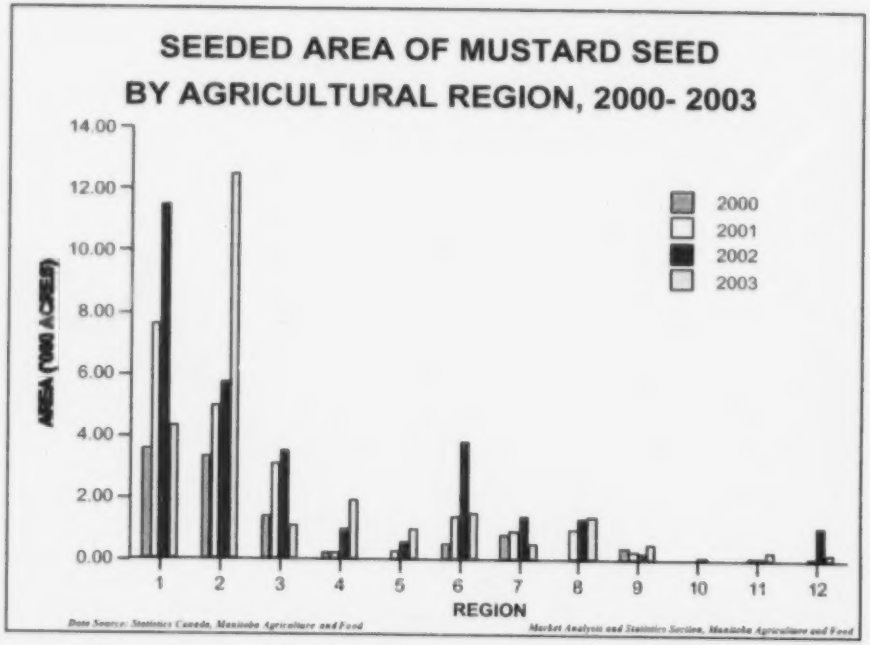
	1999	2000[R]	2001[R]	2002[R]	2003[P]	'03 as a % of '02
Estimated Number of Farms	70	100	115	115	115	100
CROP PRODUCTION:						
Seeded Area ('000 acres):	7	10	20	30	25	83
% of Canada	1.0	1.9	4.9	4.2	3.0	
Harvested Area ('000 acres):	5	9	15	30	25	83
Yield/acre (pounds):	820	810	750	730	912	125
Production (million lb):	4.1	7.3	11.3	22.0	22.8	104
% of Canada	0.6	1.6	4.9	6.5	4.6	
Average Price ($/lb):	0.137	0.148	0.310	0.300		
VALUE OF PRODUCTION ($ million):	0.56	1.08	3.45	6.58		
ESTIMATED TOTAL EXPENSES ($/acre):	221.31	217.91	203.78	189.71	210.84	111
CASH RECEIPTS ($ million):	0.8	0.8	1.8	5.4		
% of Canada	0.9	1.2	4.9	8.7		
EXPORTS ($ million):	14.5	12.2	17.2	14.6		
Mustard Seed	14.2	12.0	17.1	14.5		
Flour, Meal and Prepared Mustard	0.2	0.2	0.1	0.1		
IMPORTS ($ million):	0.32	0.35	0.53	1.76		
Mustard Seed	0.07	0.04	0.12	1.39		
Flour, Meal and Prepared Mustard	0.25	0.31	0.40	0.37		

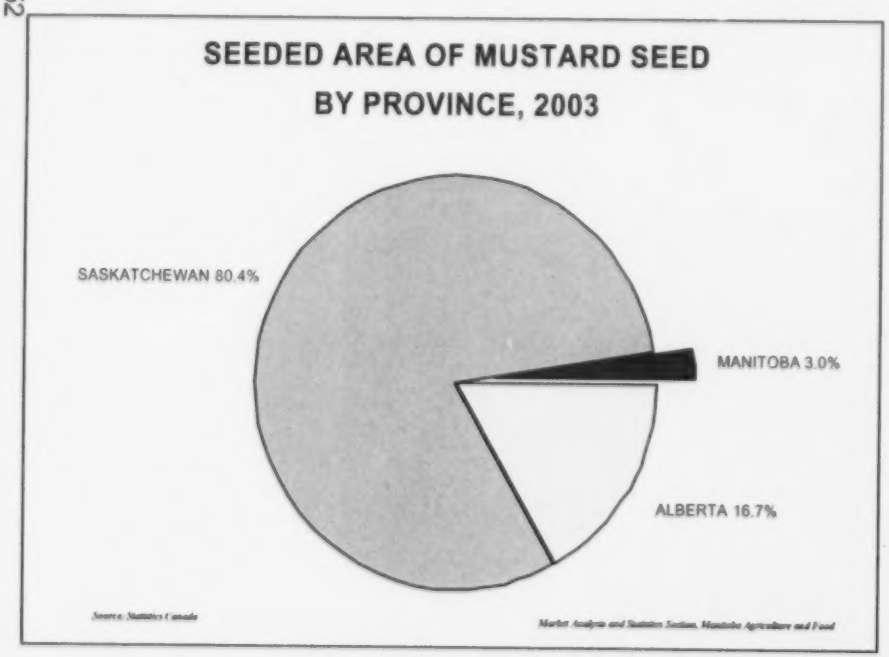
MUSTARD SEED INDUSTRY CHART, 2002

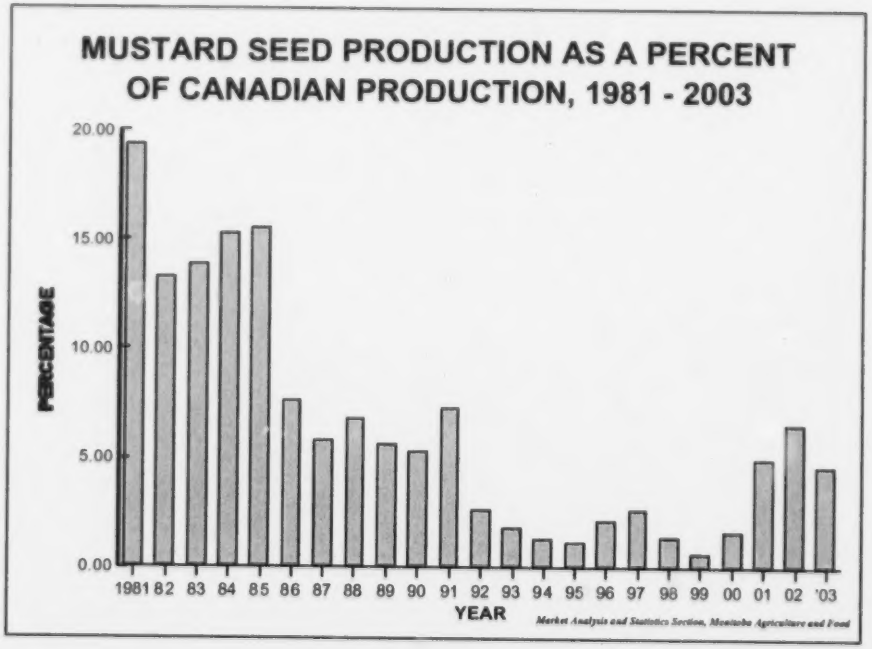


DATA SOURCE: Manitoba Agriculture, Food and Rural Initiatives, Statistics Canada, Agriculture & Agri-Food Canada

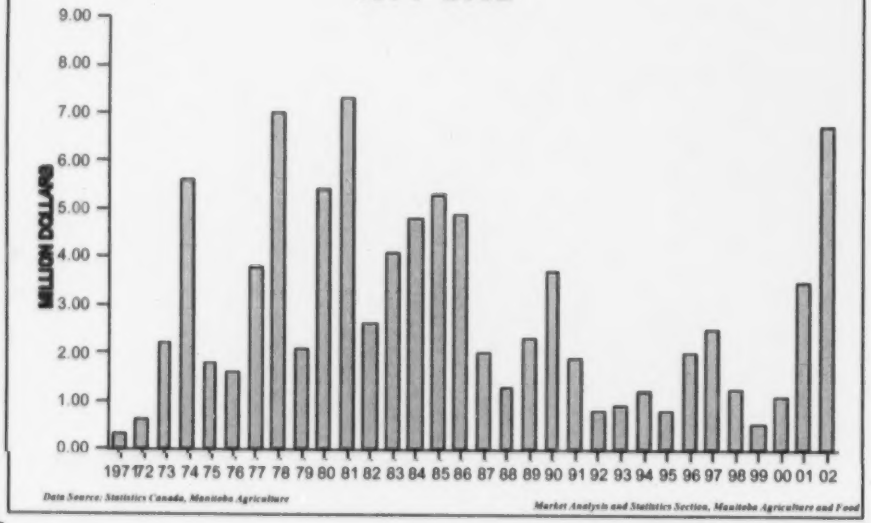

SEEDED & HARVESTED AREA OF MUSTARD SEED
BY YEAR, 1981- 2003
AREA ('000 ACRES)
60
50
40
30
20
10
0
SEEDED
HARVESTED
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00 01 02 '03
YEAR
Data Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


SEEDED AREA OF MUSTARD SEED
BY AGRICULTURAL REGION, 2000- 2003
AREA ('000 ACRES)
14.00
12.00
10.00
8.00
6.00
4.00
2.00
0.00
2000
2001
2002
2003
1 2 3 4 5 6 7 8 9 10 11 12
REGION
Data Source: Statistics Canada, Manitoba Agriculture and Food
Market Analysis and Statistics Section, Manitoba Agriculture and Food

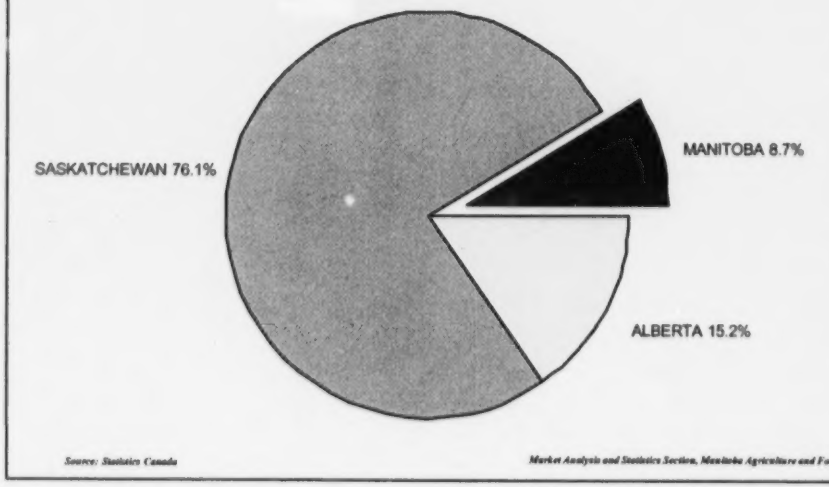

SEEDED AREA OF MUSTARD SEED
BY PROVINCE, 2003
SASKATCHEWAN 80.4%
MANITOBA 3.0%
ALBERTA 16.7%
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


MUSTARD SEED PRODUCTION AS A PERCENT
OF CANADIAN PRODUCTION, 1981 - 2003
PERCENTAGE
20.00
15.00
10.00
5.00
0.00
1981 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00 01 02 '03
YEAR
Market Analysis and Statistics Section, Manitoba Agriculture and Food

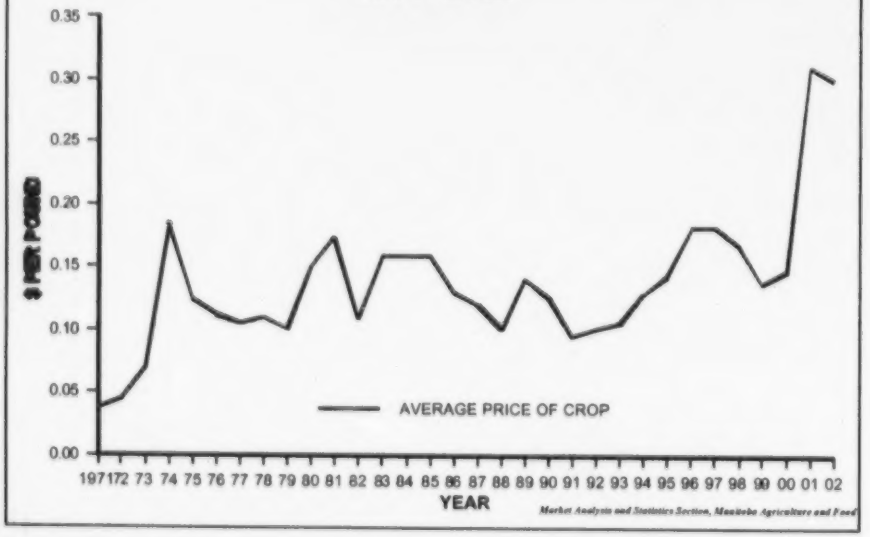
FARM VALUE OF MUSTARD SEED PRODUCTION
1971- 2002


MILLION DOLLARS
9.00
8.00
7.00
6.00
5.00
4.00
3.00
2.00
1.00
0.00
71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00 01 02
Data Source: Statistics Canada, Manitoba Agriculture
Market Analysis and Statistics Section, Manitoba Agriculture and Food

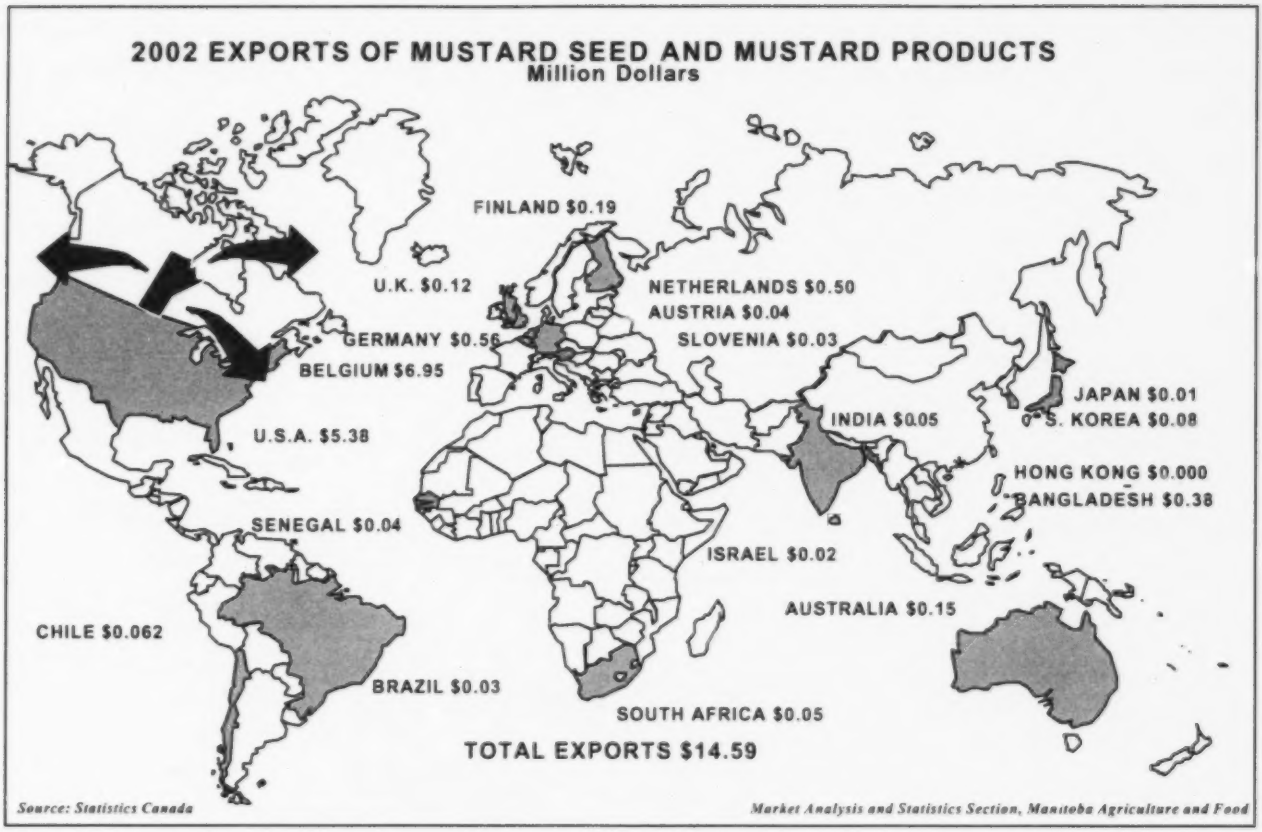
FARM CASH RECEIPTS FROM MUSTARD SEED
BY PROVINCE, 2002

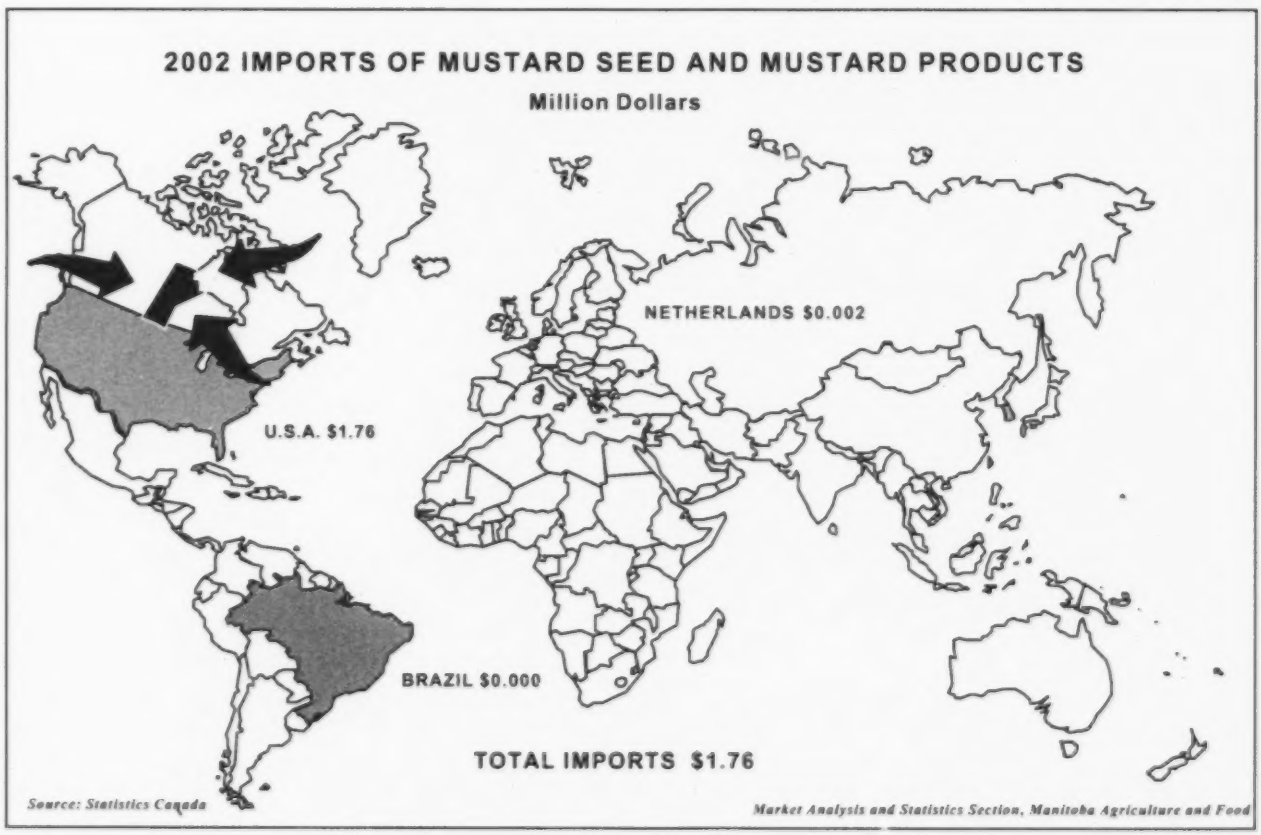


MUSTARD SEED PRICES
1971- 2002


$ PER POUND
0.35
0.30
0.25
0.20
0.15
0.10
0.05
0.00
AVERAGE PRICE OF CROP
71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00 01 02
YEAR
Market Analysis and Statistics Section, Manitoba Agriculture and Food

MANITOBA MUSTARD SEED AND PRODUCT
EXPORTS TO OTHER COUNTRIES, 1993 - 2002


2002 EXPORTS OF MUSTARD SEED AND MUSTARD PRODUCTS
Million Dollars
FINLAND $0.19
U.K. $0.12
NETHERLANDS $0.50
AUSTRIA $0.04
GERMANY $0.56
SLOVENIA $0.03
BELGIUM $6.95
JAPAN $0.01
S. KOREA $0.08
INDIA $0.05
U.S.A. $5.38
HONG KONG $0.000
BANGLADESH $0.38
SENEGAL $0.04
ISRAEL $0.02
AUSTRALIA $0.15
CHILE $0.062
BRAZIL $0.03
SOUTH AFRICA $0.05
TOTAL EXPORTS $14.59
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


2002 IMPORTS OF MUSTARD SEED AND MUSTARD PRODUCTS
Million Dollars
NETHERLANDS $0.002
U.S.A. $1.76
BRAZIL $0.000
TOTAL IMPORTS $1.76
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

FORAGE SECTOR

FORAGE SECTOR PROFILE

Production:

Tame Hay: Manitoba livestock producers have been using native hay and pasture since homesteading in the province began. The first recorded production of tame or cultivated hay was in 1908, when 215,000 tons of hay were produced from 119,000 acres. The crop was priced at $7.40 per ton for a total value of $1.6 million. As cattle numbers increased in the 1920s, so did the area of tame hay, which was slightly over 200,000 acres until 1927 when the area doubled. The area of tame hay increased to around one million acres in the 1960s rising to 1.9 million acres during the years, 1992 to 1997, and to over two million acres from 1998 to 2003. Adverse weather conditions in many areas of the province in 1997 reduced hay yields to an average of 0.85 tons per acre, the lowest in 40 years. Less than ideal conditions in 2003 resulted in yields of 1.1 tons per acre, 24 percent below the ten-year average yield of 1.4 tons per acre. Hay production in 2003 was estimated at 2.35 million tons, slightly below the 2002 crop, but a drop of 32 percent from the 2001 crop. A record average yield of 2.37 ton per acre was recorded in 1986, but tame hay production peaked in 1990 at 4 million tons.

About 75 percent of Manitoba's hay is used for beef production with about 25 percent comprised of various dairy-quality hays. Manitoba produced about 9.5 percent of the Canadian tame hay crop in 2003, down from 15.4 percent in 2001.

Average tame hay prices declined from $59 per ton for the 1997 crop to about $50 per ton from 1998 to 2000, but rose to a record $68 per ton in 2002 due to a shortage of hay on the Prairies due to drought. The last time prices were over $60 per ton was during the drought years 1980 and 1988. The total value of the Manitoba tame hay crop was highest in 1993, at $192.8 million, making it the third most valuable crop in the province that year after wheat and canola. In 1997, due to significantly reduced yields, the hay value of $94.4 million was the lowest level since 1975, but the value increased annually to $187.1 million in 1999. The smaller 2000 crop led to a drop in hay production value to $149.7 million, but the value rose to $186.3 million in 2001. The value declined to $161.6 million in 2002.

Estimated operating expenses for tame hay production rose from $80.25 per acre in 1997 to $80.83 per acre in 1999, but declined to $78.42 per acre in 2000. Expenses increased to $89.61 per acre in 2001, declined to $85.21 in 2002, but rose to $93.12 per acre in 2003.

Forage Seeds: The first record of commercial forage seed production in Manitoba was in 1936 when the crop was valued at $108,000. The interest in forage seed production grew and by 1979 the crop was valued at over $8 million. Crop area, production and prices varied over the next fifteen years. The crop value went from $14.1 million in 1987 down to a low of $2.4 million in 1993. In 2002, a near record 29.8 million pounds of forage seed, valued at $19.9 million, were marketed from an area of about 142,800 acres. Alfalfa seed sales (pollinated by alfalfa leaf-cutting bees) were valued at $8.8 million in 2002, followed by Timothy seed at $3.7 million, Rye Grass seed at $2.6 million and all Fescues at $1.5 million. Smaller amounts of Birdsfoot Trefoil, Bromegrass, Creeping Bentgrass, Crested Wheatgrass, Kentucky Bluegrass, Reed Canary Grass, Red Clover and Sweet Clover seed are also grown in Manitoba. Manitoba produces about 30-40 percent of the forage seed marketed by Manitoba companies.

Pasture: In 2001, there were 3,905,200 acres of unimproved, native pasture and hayland in the province, down from 4,326,000 acres in 1991. Improved pastureland increased from 843,000 acres in 1991 to 947,600 acres in 2001.

Marketing:

Most of the Manitoba tame hay crop is used for beef and dairy cattle production in the province with small amounts being used for other ruminant species, such as sheep, goats, deer,

elk and bison. Only a small portion of the crop is sold out of the province as hay. Some excellent dairy-quality alfalfa and alfalfa-mix hay is exported to the U.S.

Hay is sold from farm to farm, from surplus areas of the province to deficit areas. A hay listing service is provided by Manitoba Agriculture, Food and Rural Initiatives.

Some of Manitoba's alfalfa and Timothy hay is sold to pelleting and compacting plants.

Annual farm cash receipts from the sector reflect only recorded exports of the hay crop, which generally are under-reported. Cash receipts from hay only were estimated at $20.0 million in 2001 and $20.2 million in 2002. Cash receipts from forage seed sales have been revised to better reflect Manitoba-origin forage seed exports. Receipts increased from $14.9 million in 1997 to $17.9 million in 1999, declined to $13.5 million in 2001, but increased to $18.5 million in 2002. Manitoba's contribution to Canadian forage seed receipts rose from 19.2 percent in 1997 to 26.6 percent in 2002.

Processing:

There are two main processors of alfalfa into pellets and meal, Alfalfa Products Ltd. in Fort Whyte (Winnipeg) and Coldstream Alfalfa Processing, Ltd. in Dauphin.

Several compacting plants were operational in 2002-03, including Sunridge Forage Ltd. in Russell and Canadian Greenfield Forage in Teulon. These plants compact Timothy hay mainly for the Japanese and Korean markets. It is estimated that Timothy hay sales to these two countries in 2002 had a farm-gate value of about $5.5 million. Lake Winnipeg Hay Co. in Fisher Branch is no longer in operation. The equipment from the plant has been moved to Dauphin where it is being used by a new company, Intermountain Forage Ltd., which began processing crop in the fall of 2003.

Trade:

Exports of hay to the United States are comprised mainly of high-quality alfalfa and alfalfa-mix bales for the dairy industry. The dairy states in the United States have been reducing their hay area in recent years, which provides an opportunity for Manitoba exporters of high-quality hay. Smaller quantities of higher-valued compressed hay were sold to 6 countries in 2002, including Japan, South Korea, Argentina and the United States. Total 2002 hay exports amounted to $7.9 million, down from $8.1 million the year before.

Exports of alfalfa pellets and meal, mainly to Japan and the United States, totalled $10.4 million in 2002, up significantly from $0.03 million in 1999.

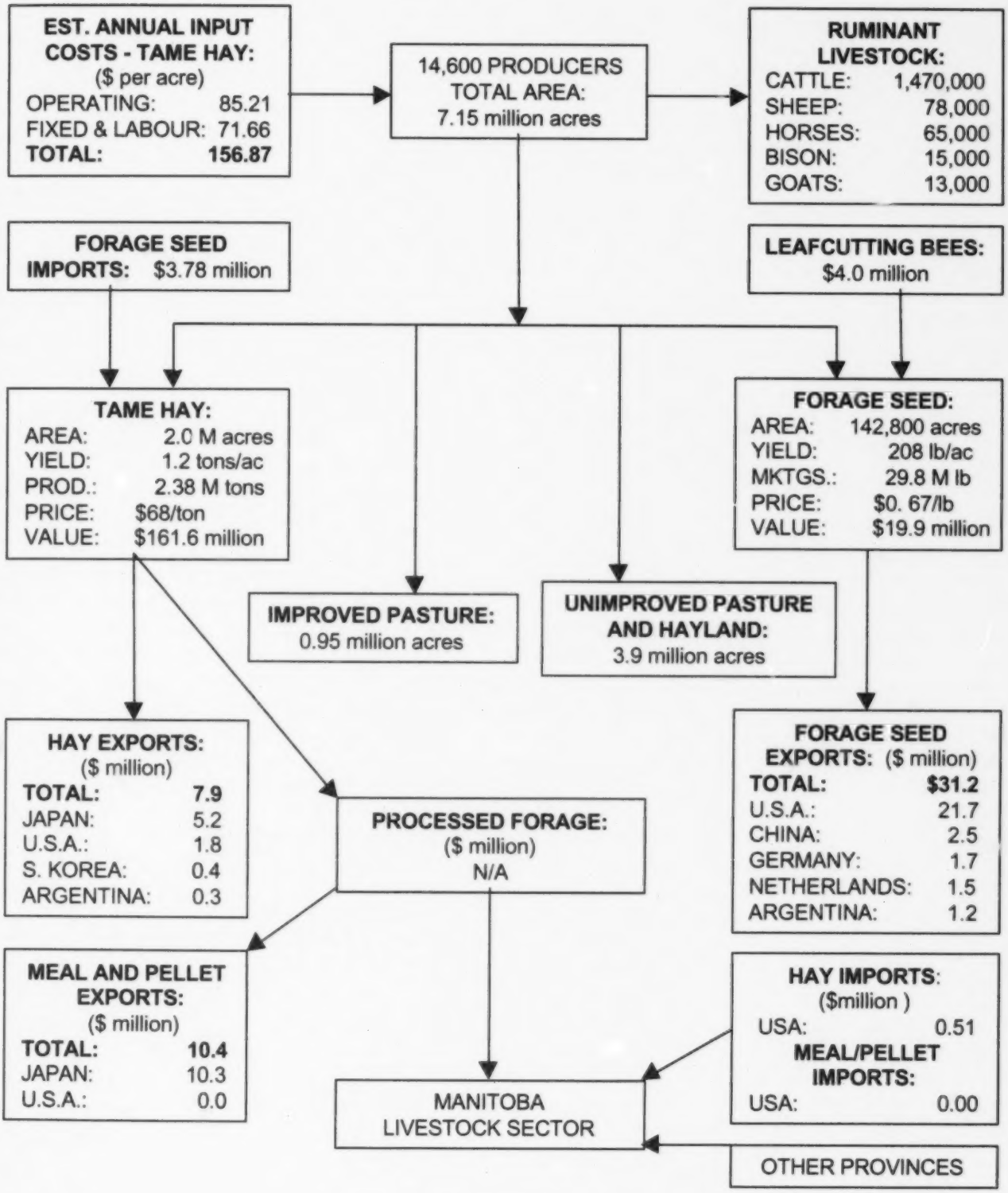
Forage seed export data for Manitoba include seed from other western provinces and small amounts of imported seed. Forage seed exports increased from $17.4 million in 1993 to $41.4 million in 2000, but decreased to $36.3 million and $31.2 million in 2001 and 2002 respectively. Of 20 countries which purchased forage seeds from Manitoba-based companies in 2002, the United States was Manitoba's most important customer, buying $21.7 million or 70 percent.

Thirteen countries supplied Manitoba companies with forage seeds valued at $3.8 million in 2002, the largest supplier being the United States. This was down from $6.7 million in 1999. Small quantities of hay were also imported from the U.S. in 2002.

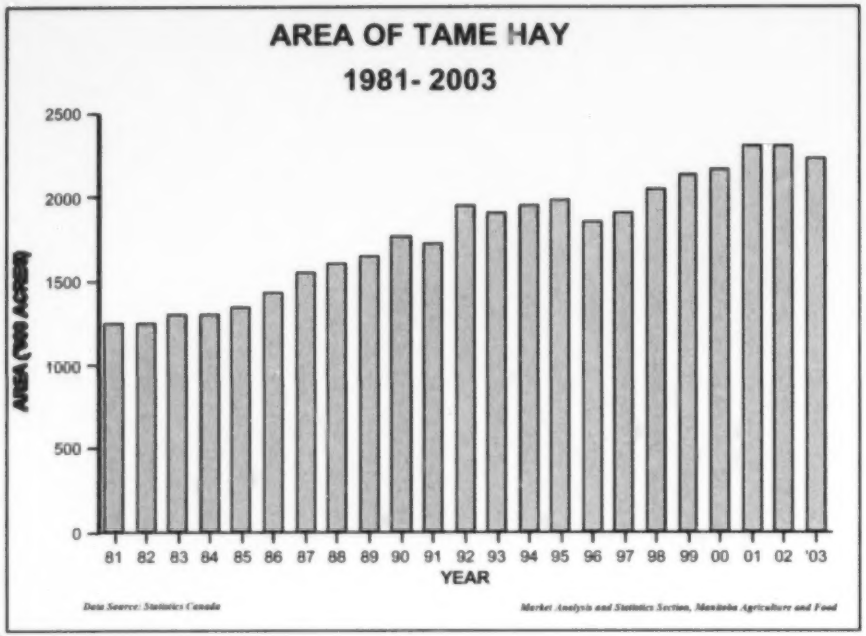
FORAGE SECTOR

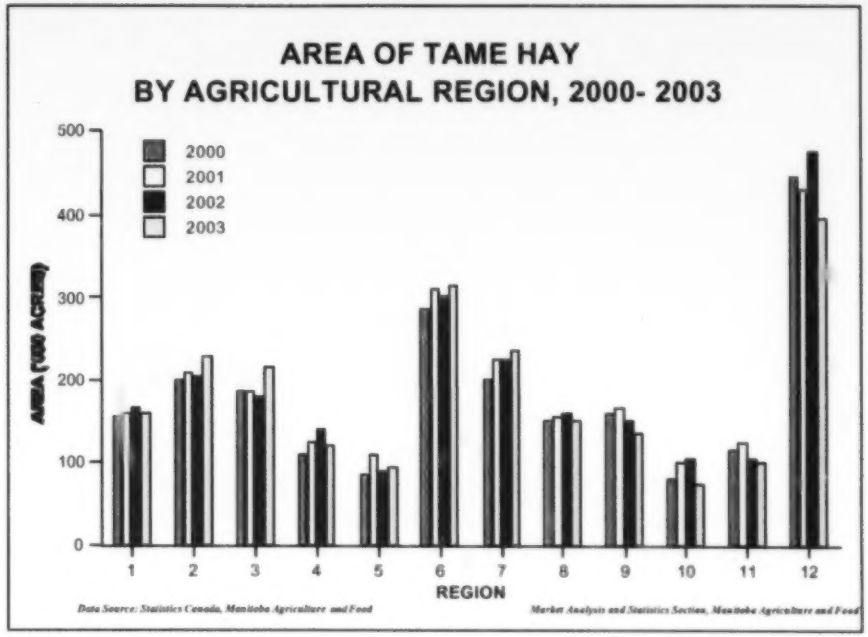
	1999[R]	2000[R]	2001[R]	2002[R]	2003[P]	'03 as a % of '02
Number of Farms with Hay/Forage	14,250	14,500	14,625	14,600	14,600	100
TAME HAY PRODUCTION:						
Seeded Area ('000 acres):	2,135	2,170	2,300	2,300	2,225	97
% of Canada	12.7	12.3	12.1	12.1	12.0	
Harvested Area ('000 acres):	1,980	2,070	2,215	2,025	2,125	105
Yield (tons/acre):	1.94	1.52	1.60	1.20	1.10	92
Production ('000 tons):	3,750	3,000	3,450	2,375	2,350	99
% of Canada	13.8	12.0	15.4	11.9	9.5	
Average Price ($/ton):	50.00	50.00	54.00	68.00		
VALUE OF PROD'N ($ million):	187.1	149.7	186.3	161.6		
EST. OP. EXPENSES ($/acre):	80.83	78.42	89.61	85.21	93.12	109
CASH RECEIPTS ($ million):	16.1	18.3	20.0	20.2		
% of Canada	9.3	9.0	9.4	8.7		
FORAGE SEED PRODUCTION:						
Harvested Area ('000 acres):	100.9	117.4	129.0	142.8		
Yield (lb/acre):	202	238	232	208		
Marketings ('000 lb):	20,360	28,000	29,890	29,750		
Average Price ($/lb):	0.88	0.57	0.45	0.67		
VALUE OF PROD'N ($ million):	17.9	16.0	13.5	19.9		
CASH RECEIPTS ($ million):	17.9	19.2	13.5	18.5		
% of Canada	22.5	23.1	23.7	26.6		
IMPROVED PASTURE ('000 acres):	900	900	948	950		
NATIVE PASTURE ('000 acres):	4,000	3,950	3,905	3,900		
EXPORTS ($ million):	43.4	47.3	48.5	49.4		
Hay	3.2	5.6	8.1	7.9		
Alfalfa Pellets and Meal	0.03	0.3	4.1	10.4		
Forage Seeds	40.2	41.4	36.3	31.2		
IMPORTS ($ million):	6.80	6.12	4.11	4.29		
Hay	0.08	0.05	0.26	0.51		
Alfalfa Pellets and Meal	0.00	0.00	0.00	0.00		
Forage Seeds	6.72	6.07	3.85	3.78		

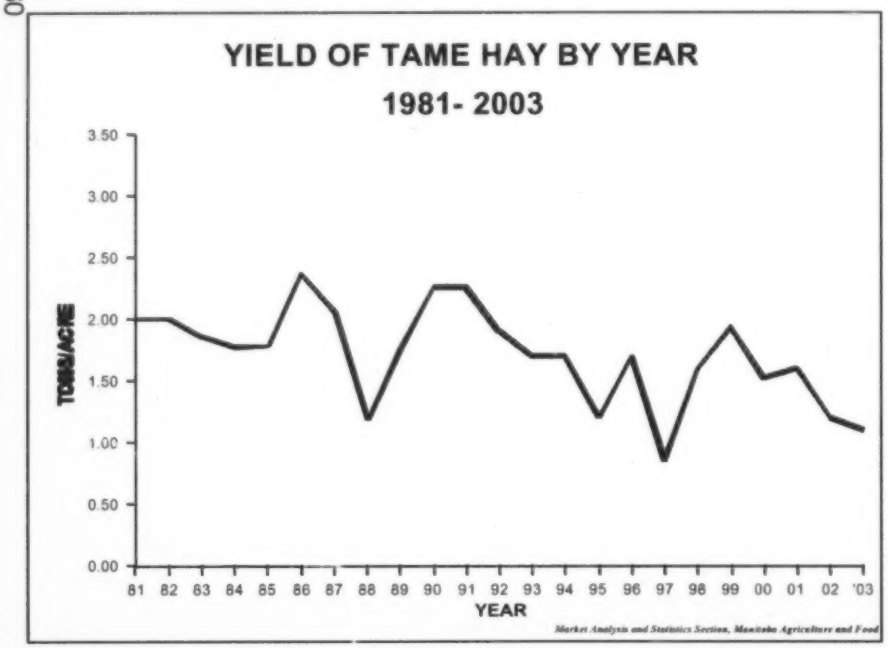
FORAGE INDUSTRY CHART, 2002

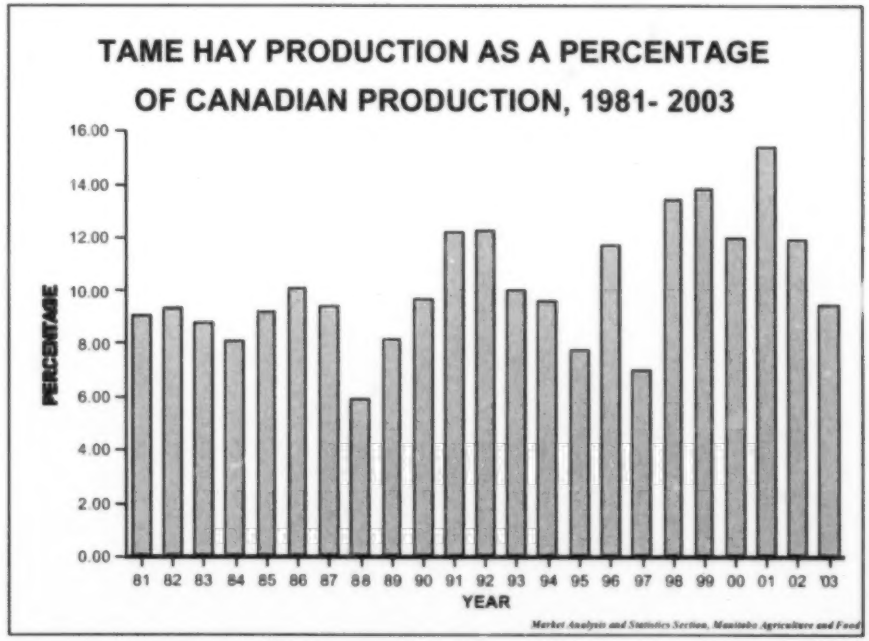


DATA SOURCE: Manitoba Agriculture, Food and Rural Initiatives, Statistics Canada, Agriculture & Agri-Food Canada

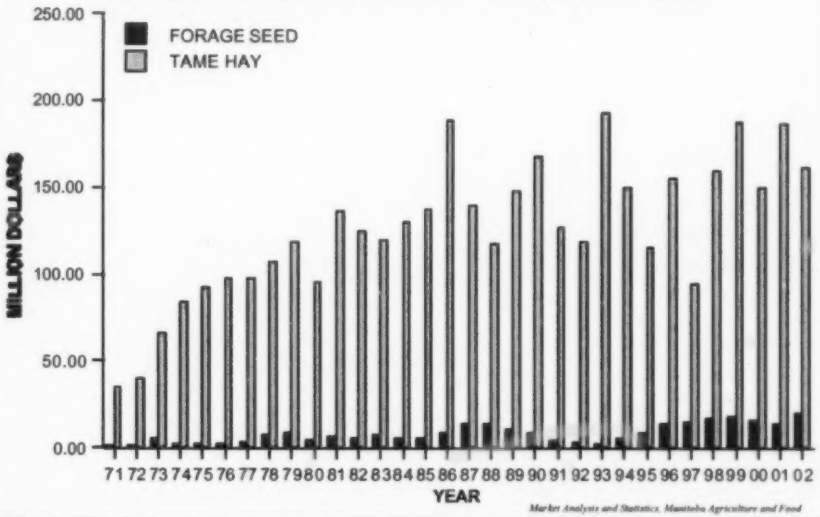

AREA OF TAME HAY
1981- 2003
AREA ('000 ACRES)
2500
2000
1500
1000
500
0
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00 01 02 '03
YEAR
Data Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


AREA OF TAME HAY
BY AGRICULTURAL REGION, 2000- 2003
2000
2001
2002
2003
AREA ('000 ACRES)
500
400
300
200
100
0
1 2 3 4 5 6 7 8 9 10 11 12
REGION
Data Source: Statistics Canada, Manitoba Agriculture and Food
Market Analysis and Statistics Section, Manitoba Agriculture and Food


YIELD OF TAME HAY BY YEAR
1981- 2003
TONS/ACRE
3.50
3.00
2.50
2.00
1.50
1.00
0.50
0.00
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00 01 02 '03
YEAR
Market Analysis and Statistics Section, Manitoba Agriculture and Food


TAME HAY PRODUCTION AS A PERCENTAGE
OF CANADIAN PRODUCTION, 1981- 2003
PERCENTAGE
16.00
14.00
12.00
10.00
8.00
6.00
4.00
2.00
0.00
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00 01 02 '03
YEAR
Market Analysis and Statistics Section, Manitoba Agriculture and Food

FARM VALUE OF TAME HAY AND FORAGE SEED PRODUCTION, 1971- 2002



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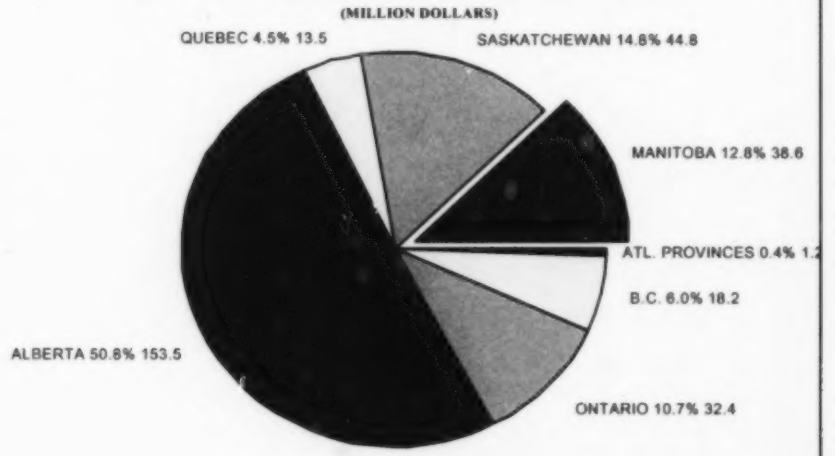
FARM CASH RECEIPTS FROM TAME HAY AND FORAGE SEED BY PROVINCE, 2002



Source: Statistics Canada

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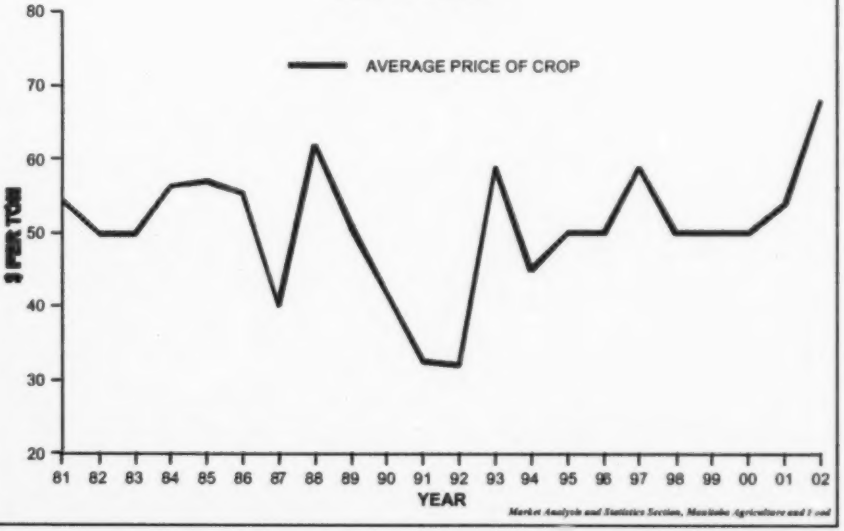
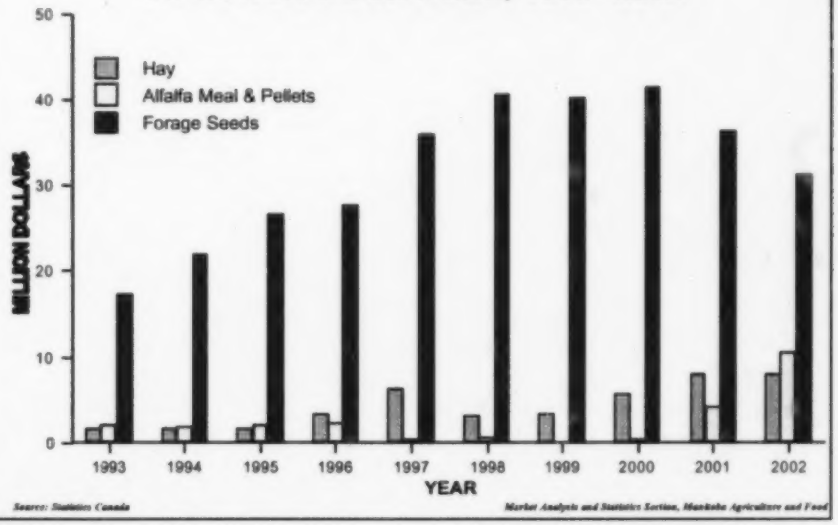
TAME HAY PRICES 1981- 2002



Market Analysis and Statistics Section, Manitoba Agriculture and Food

MANITOBA TAME HAY AND PRODUCTS EXPORTS TO OTHER COUNTRIES, 1993- 2002



Source: Statistics Canada

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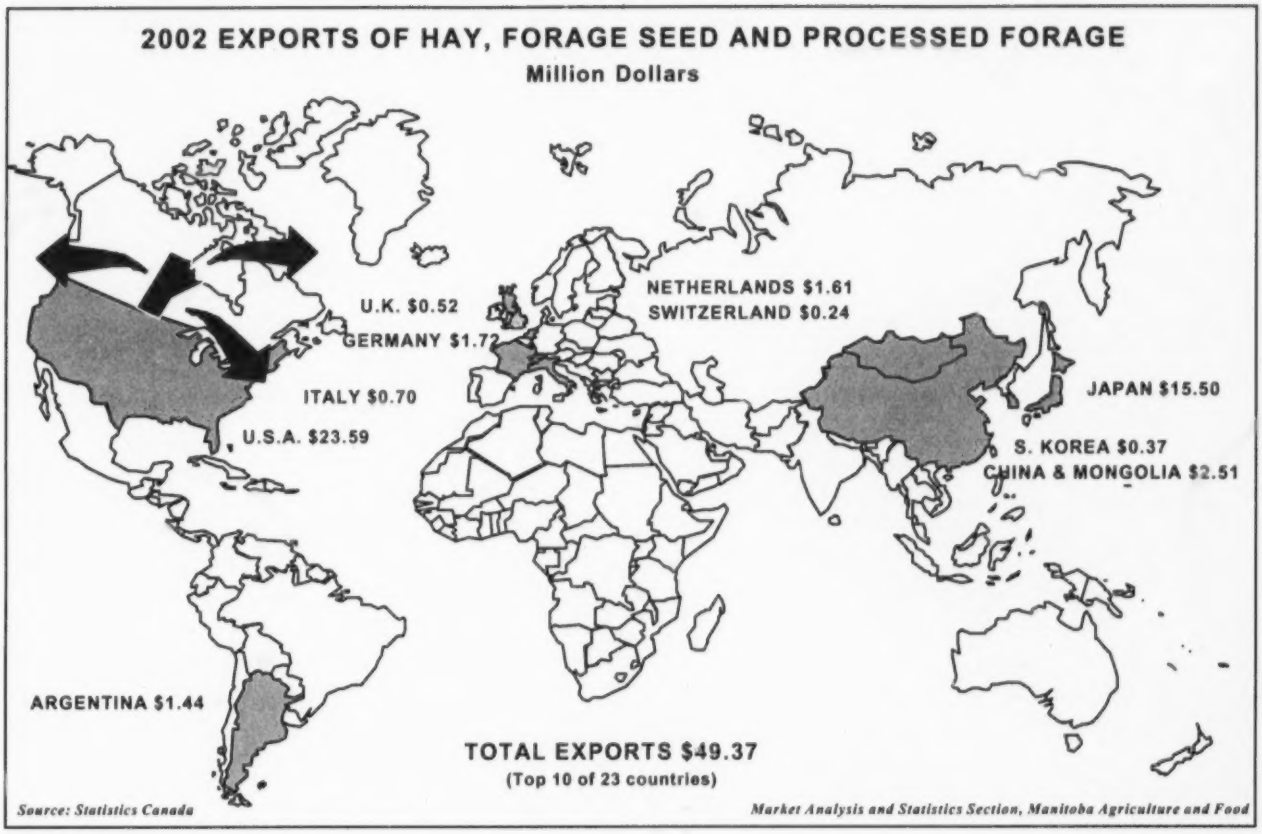
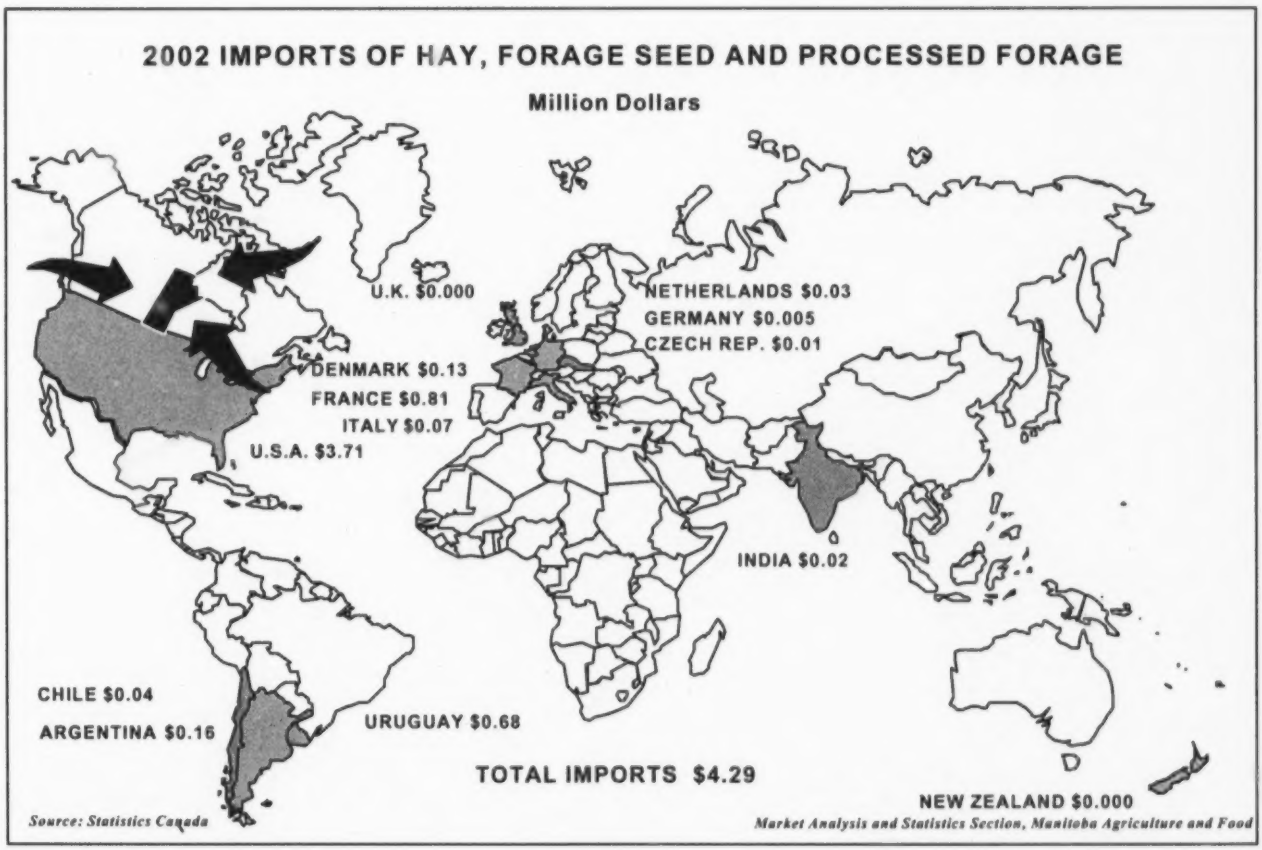

2002 EXPORTS OF HAY, FORAGE SEED AND PROCESSED FORAGE
Million Dollars
U.K. $0.52
GERMANY $1.72
ITALY $0.70
U.S.A. $23.59
NETHERLANDS $1.61
SWITZERLAND $0.24
JAPAN $15.50
S. KOREA $0.37
CHINA & MONGOLIA $2.51
ARGENTINA $1.44
TOTAL EXPORTS $49.37
(Top 10 of 23 countries)
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


2002 IMPORTS OF HAY, FORAGE SEED AND PROCESSED FORAGE
Million Dollars
U.K. $0.000
DENMARK $0.13
FRANCE $0.81
ITALY $0.07
U.S.A. $3.71
NETHERLANDS $0.03
GERMANY $0.005
CZECH REP. $0.01
INDIA $0.02
CHILE $0.04
ARGENTINA $0.16
URUGUAY $0.68
TOTAL IMPORTS $4.29
NEW ZEALAND $0.000
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food